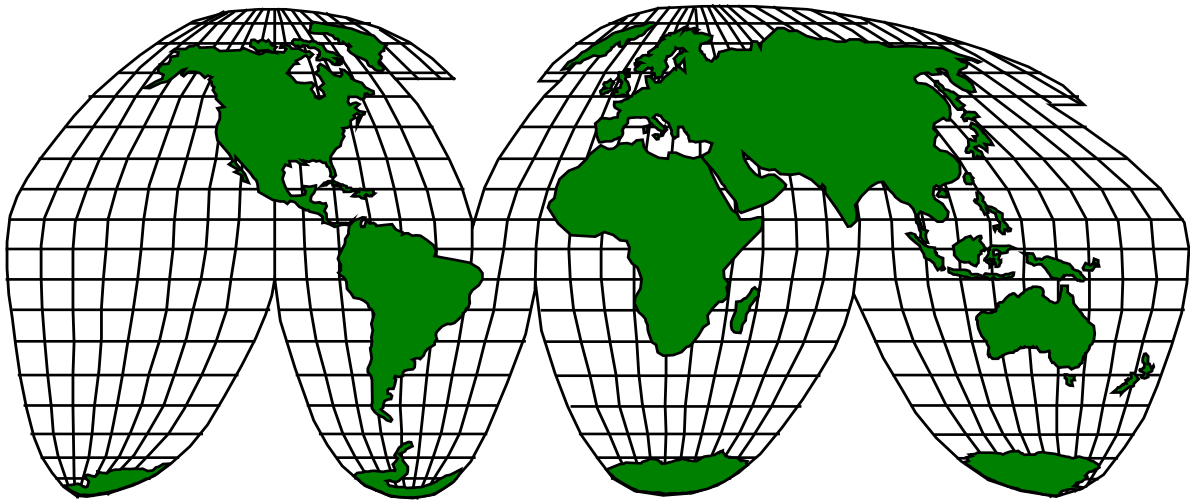


# **A Market Profile of Overseas & Mexican Visitors To California**

**2004**



**A Joint Marketing Venture of  
The California Travel and Tourism Commission  
& The California Division of Tourism**

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**EXECUTIVE SUMMARY  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- **Total Overseas Market.** There were approximately 20.3 million overseas visitors to the U.S. in 2004, up 12.7% from 18.0 million in 2003. More than 4.2 million overseas visitors (20.7%) indicated California was a destination on their U.S. trip, up 5.6 percent from just under 4.0 million overseas visitors to California in 2003.
- **Mexican (Air).** There were 1,494,000 Mexican travelers who arrived in the U.S. by air in 2004. Approximately 409,000 (27.4%) of these Mexican travelers visited California during their U.S. trip.<sup>1</sup>
- **Country of Origin.** California's top ten overseas visitor market countries were:

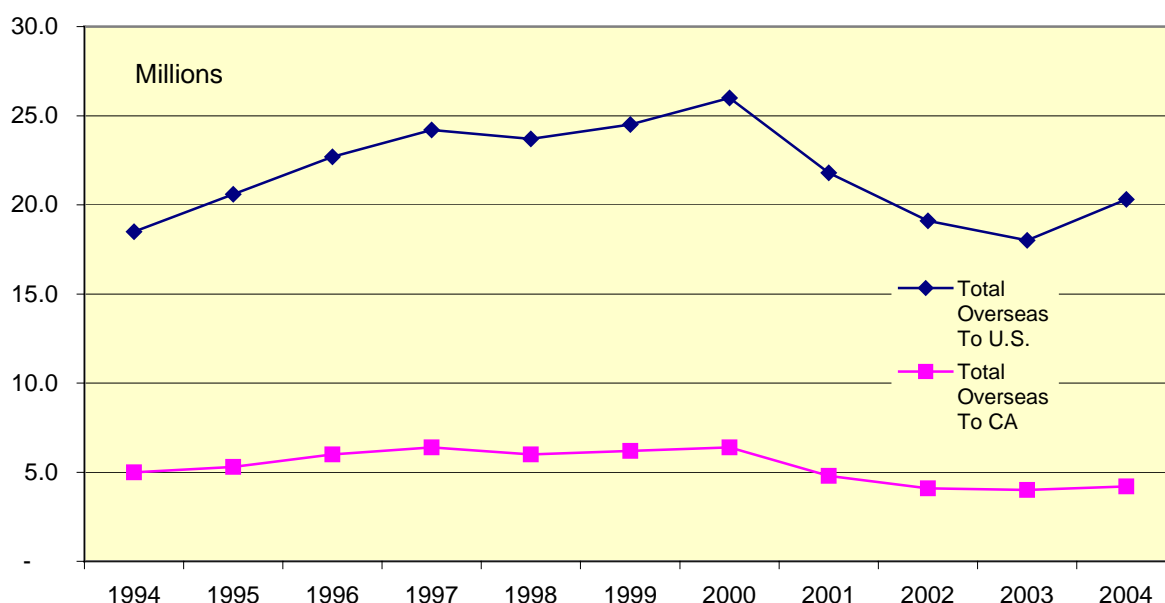
		<b>Number of California Visitors</b>		<b>Percent of Total California Visitors</b>	
		<b><u>2003</u></b>	<b><u>2004</u></b>	<b><u>2003</u></b>	<b><u>2004</u></b>
1)	United Kingdom	693,000	693,000	17%	17%
2)	Japan	590,000	630,000	15%	16%
3)	Germany	238,000	275,000	6%	7%
4)	South Korea	303,000	273,000	8%	7%
5)	Australia	200,000	259,000	5%	6%
6)	France	196,000	215,000	5%	5%
7)	Taiwan (ROC)	151,000	177,000	4%	4%
8)	Italy	75,000	115,000	2%	3%
9)	Netherlands	94,000	115,000	2%	3%
10)	Philippines	134,000	109,000	3%	3%

Japan and the U.K. make up about one-third of the overseas visitors to California. In 2004, the number of British visitors to California remained at 693,000, but there was almost a 7% increase of Japanese visitors, from 590,000 in 2003 to 630,000 in 2004. South Korea dropped from third place to fifth among the top five countries.

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<sup>1</sup> The majority of Mexican visitors to California in 2004 arrived by ground transportation through a U.S. border port of entry. Mexican visitors arriving in the U.S. by ground transportation are not included in the "In-Flight Survey" and are not included in this study. Please note that Canadians are also not included in the In-Flight Survey.

### Total Overseas Visitors To The U.S. and California



- **Market Share.** Among the ten largest overseas markets, California's share of visitors from Australia, Germany, Italy and the Netherlands increased, while the market share for Japan, U.K., South Korea, France, the Philippines, and Taiwan decreased in 2004.
- **Decline in Overall Market Share.** California's market share of overseas visitors to the U.S. has recorded a general decline since the late 1990s. In 1997, California's market share of overseas visitors to the U.S. was 26.6 percent. By 2004, California's market share had dropped to 20.7 percent.

### California Market Share of U.S. Visitors By Country

	<u>2003</u>	<u>2004</u>
1) United Kingdom	18%	16%
2) Japan	19%	17%
3) Germany	20%	21%
4) South Korea	49%	44%
5) Australia	49%	50%
6) France	29%	28%
7) Taiwan (ROC)	63%	60%
8) Italy	18%	25%
9) Netherlands	25%	27%
10) Philippines	82%	76%

- **Main Destination.** Approximately three in four (73%) overseas visitors to California indicated that California was their main destination, similar to that reported in previous years.
- **California MSAs Visited.** Similar to last year's data, the most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California included Los Angeles - Long Beach (55%) and San Francisco (45%), followed by San Diego (12%), San Jose (8%) and Anaheim-Santa Ana (8%).
- **Purpose of Trip.** Overseas travelers to California listed multiple reasons for their trip including: vacation (59%, the same percentage as in 2003), visiting friends/relatives (41%) and business (31%). Compared to other overseas travelers, visitors from China (57%) and India (52%) have the highest proportion of business travelers, while visitors from the U.K. (78%), and Australia/New Zealand (71%) have the highest proportion of travelers on vacation/holiday. Taiwan (53%) and South America (51%) are more likely to visit friends/relatives than any other overseas visitors to California.
- **Leisure/Recreation Activities.** There was an increase in leisure activities reported by overseas visitors to California in 2004. Shopping (88%), dining (87%), and sightseeing (52%) were the most common leisure and recreation activities of overseas visitors. More than 95% of Chinese visitors and 92% of Australian and New Zealand visitors reported shopping as one of their leisure activities
- **Use of Travel Agents.** Travel agents were used to book 59% of air trips. Travel agent usage has declined steadily over the last several years. Visitors from Australia/New Zealand (78%) and India (73%) reported much higher dependence on travel agents to book air trips. Only 27% of overseas travelers relied on travel agents to make lodging arrangements, 10% reported contacting hotels/motels directly, and another 9% reported that their company's travel department made booked hotel rooms for them.
- **Accommodations.** More than three-quarters of overseas travelers to California reported staying in hotels or motels at some time during their trip (78%), increasing from 73% in 2003. Visitors from Japan, U.K., Australia/New Zealand and France, reported the highest hotel usage of visitor groups (84%, 84%, 83% and 83%, respectively). The number of Korean travelers using hotels climbed back to 74% this year, after declining a very low level in 2003 (51%).
- **Sex and Age.** Two-thirds (64%) of overseas travelers to California during 2004 were adult males and one-third (36%) were adult females. Results were similar in previous years. During 2004, the average age of traveling adult males (43 years old) was two years older than the average traveling adult female (41 years old).
- **Length of Stay.** During 2004, California's overseas visitors spent an average of 20 nights in the U.S. and 11 nights in California, these numbers are very similar to the 2003 numbers (21 and 11). Visitors from India reported the highest number of nights stayed in the U.S. (49 nights) and in California (23 nights). South Korean visitors also reported long stays in both the U.S. (29 nights) and in California (18 nights).

- **Use of Domestic Airlines and Rental Cars.** Almost four in ten overseas visitors to California used airlines in the U.S. (40%), taxi/cab/limousine (39%), or a rental car (38%) for transportation within the U.S. Visitors from Germany, France and South Korea were most likely to rent an auto, while visitors from Mexico were least likely. Visitors from South America as well as those from Australia/New Zealand were the most likely to fly between U.S. cities, while visitors from Mexico were least likely.
- **Advance Trip Decision.** The average overseas visitor to California decides to travel a median of 50 days prior to the actual trip, ten days more than the 40 days reported in 2003. In 2004 visitors from Australia/New Zealand and the U.K. took the longest time to plan their trip to California (median = 90 days), while visitors from Mexico took the shortest time (median = 20 days).
- **Advance Ticket Purchase.** Overseas visitors to California purchased their airline ticket a median of 30 days prior to the actual trip. Visitors from Mexico and South Korea reported the shortest time frame from airline reservation to departure date (median of 10 days) and visitors from the U.K. and Australia/New Zealand (median of 60 days) reported the longest time frame from airline reservation to departure.
- **Travel Party Size.** Consistent with results from the previous year, the average travel party size for all overseas visitors to California during 2004 was 1.5 people. Visitors from Mexico and China were the most likely to include children (13% and 12%, respectively).
- **Prepaid Trip Package.** Package tours were used by only 15 percent of all 2004 visitors to California, slightly higher than that reported in 2003 (13%) and 2002 (12%). During 2004, visitors to California reporting the highest use of inclusive tours were from the U.K. and Australia/New Zealand (26% and 19% respectively).
- **Expenditures in the U.S. – “All to California” Visitors.** Expenditures in the U.S. during 2004 rose from 2003, averaging \$95 per person per day (average expenditure in 2003 was \$90 per day). In 2004, overseas visitors' total trip expenditures averaged \$3,751 compared with \$3,569 in 2003. Visitors to California from Japan (\$146) followed by visitors from the U.K. (\$107), reported the highest average daily expenditures.
- **Expenditures - "California Only" Visitors.** Visitors to the U.S. who only visited California had total trip expenditures averaging \$3,209. Their average daily expenditures in the U.S. (\$88) were higher than those reported in 2003 (\$86).

**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA\***  
**SELECTED HIGHLIGHTS**  
**(2004)**

	All Overseas Visitors	Japan	United Kingdom	Germany	Australia New Zealand	South America	France	Taiwan	South Korea	China w/o HK	India	Mexico (Air)
Estimated Travelers	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
Business (% Change 2003/2004)	31% (-3%)	35% (-7%)	18% (-18%)	32% (+3%)	24% (-18%)	31% (-20%)	36% (+33%)	38% (-14%)	38% (+36%)	57% N/A	52% N/A	48% N/A
Vacation (% Change 2003/2004)	59% (+0%)	52% (+2%)	78% (+6%)	59% (+2%)	71% (+11%)	45% (-4%)	57% (-12%)	53% (+4%)	49% (-16%)	46% N/A	34% N/A	65% N/A
Adv. Trip Decision (mean days)	81.1	54.3	123.9	101.8	132.2	53.5	88.2	36.9	50.3	49.6	44.9	38.6
Adv. Air Decision (mean days)	52.1	32.2	94.0	66.0	74.9	27.6	57.8	20.2	22.8	19.9	23.2	18.9
Mean Travel Party Size	1.5	1.6	1.7	1.4	1.7	1.3	1.5	1.5	1.7	1.7	1.3	1.6
Median Male Age (years)	41	43	43	41	46	43	44	39	37	39	45	37
Median Female Age (years)	39	37	43	40	40	40	45	35	33	37	45	36
Mean Household Income (\$000)	\$89	\$100	\$97	\$95	\$87	\$64	\$90	\$72	\$70	\$65	\$65	\$75
Nights CA (mean) (median) (Change in mean nts 2003/2004)	11.1 6.0 (+0.0 nts)	8.2 4.0 (+0.0 nts)	7.9 6.0 (+.4 nts)	13.1 6.0 (+1.7 nts)	8.5 5.0 (-.3 nts)	11.5 5.0 (+1.8 nts)	10.3 6.0 (+0.0 nts)	11.8 6.0 (-1.8 nts)	18.2 6.0 (-5.1 nts)	13.9 6.0 N/A	22.8 9.0 N/A	9.3 5.0 N/A
Hotel/Motel	78%	84%	84%	81%	83%	70%	83%	59%	74%	74%	51%	63%
Private Home	30%	20%	24%	34%	24%	36%	24%	48%	35%	28%	57%	49%
Rental Car	38%	33%	36%	53%	37%	30%	53%	37%	46%	33%	26%	21%
Mean Total Trip Exp. (Change in mean trip exp 2003/2004)	\$3,751 (+\$182)	\$3,720 (+\$88)	\$3,311 (-\$20)	\$3,964 (+\$236)	\$4,321 (+\$318)	\$3,057 (-\$871)	\$3,538 (+\$1,182)	\$3,118 (-\$181)	\$3,231 (+\$603)	\$3,254 N/A	\$4,843 N/A	\$2,227 N/A
Est. State Spending Impact	\$4,436 Mil.	\$754 Mil.	\$586 Mil.	\$335 Mil.	\$276 Mil.	\$179 Mil.	\$190 Mil.	\$213 Mil.	\$303 Mil.	\$128 Mil.	\$149 Mil.	\$373 Mil.

\*Does not include Canadian visitors. Only Mexicans arriving in the U.S. by air were included in the study.

Source: ITA/OTTI, Survey of International Air Travelers, 2004, CIC Research, Inc.

**OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA\***  
**SELECTED HIGHLIGHTS**  
**(2004)**

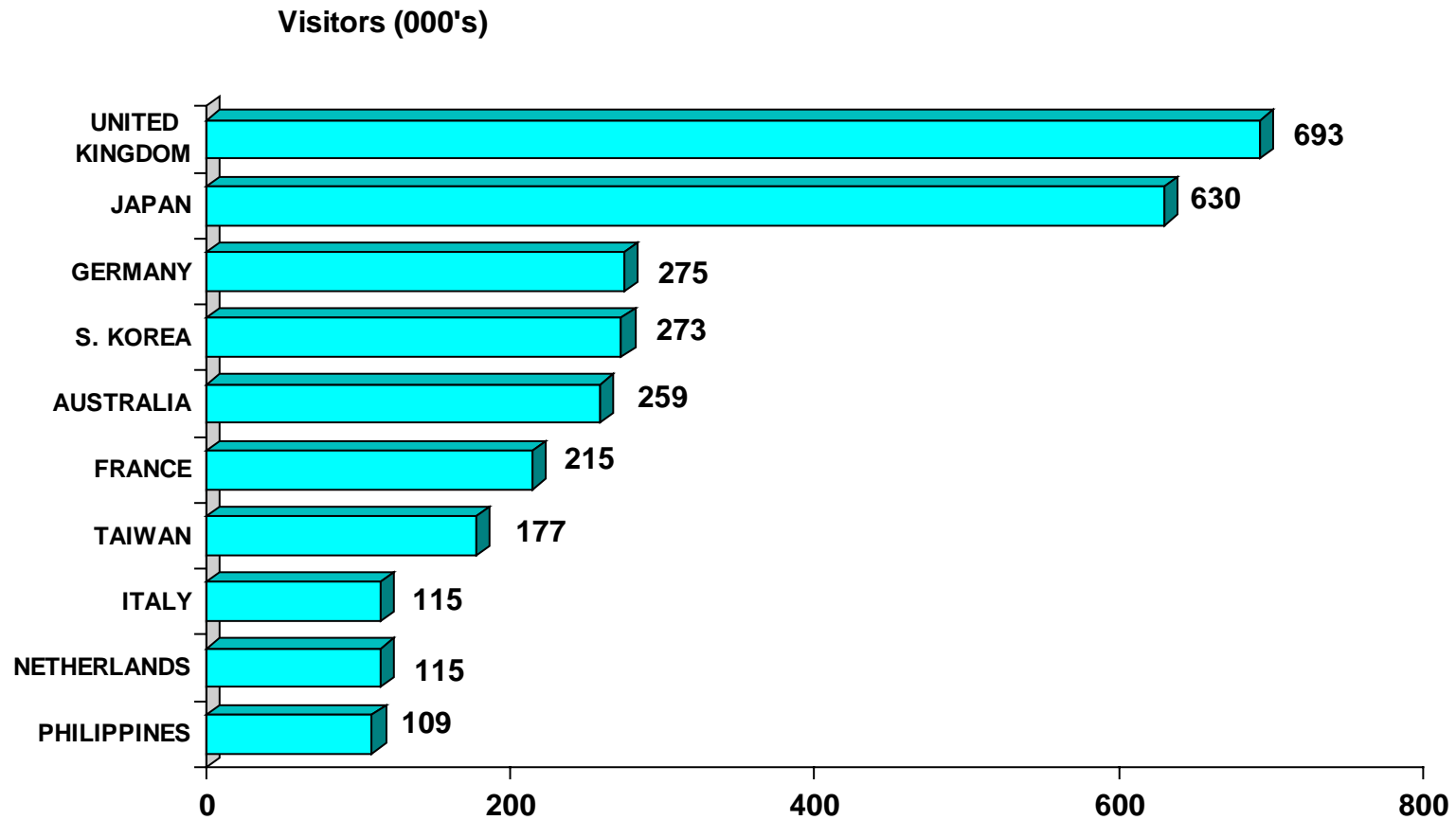
	All Overseas Visitors	Japan	United Kingdom	Germany	Australia New Zealand	South America	France	Taiwan	South Korea	China w/o HK	India	Mexico (Air)
Estimated Travelers	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
Business	4%	2%	2%	3%	5%	3%	6%	5%	4%	12%	6%	2%
Vacation	81%	85%	89%	80%	87%	57%	82%	73%	81%	73%	57%	74%
Adv. Trip Decision (mean days)	105.8	67.3	143.2	128.6	154.6	64.2	119.2	40.5	53.6	60.1	67.2	43.5
Adv. Air Decision (mean days)	72.0	44.8	111.5	83.4	88.5	30.2	80.0	23.5	24.9	28.1	33.1	18.6
Mean Travel Party Size	1.7	1.9	1.9	1.5	1.8	1.5	1.9	1.6	1.8	1.8	1.4	1.6
Median Male Age (years)	45	43	46	42	46	48	49	41	49	42	52	41
Median Female Age (years)	41	39	45	41	42	45	44	37	34	40	51	45
Mean Household Income (\$000)	\$80	\$86	\$91	\$81	\$74	\$57	\$79	\$64	\$61	\$101	\$47	\$66
Nights CA (mean)	10	9	8	11	9	13	10	13	14	12	32	12
(median)	6	4	6	7	5	5	7	7	10	7	12	8
Hotel/Motel	74%	76%	84%	78%	83%	58%	75%	39%	70%	64%	33%	50%
Private Home	36%	32%	24%	43%	24%	44%	34%	70%	57%	45%	79%	66%
Rental Car	38%	27%	35%	53%	37%	32%	66%	29%	41%	30%	30%	18%
Mean Total Trip Expenditure	\$3,149	\$2,718	\$3,093	\$3,051	\$3,905	\$2,794	\$2,439	\$2,557	\$2,205	\$2,664	\$3,811	\$2,156

\*Does not include Canadian visitors. Only Mexicans arriving in the U.S. by air were included in the study.

Source: ITA/OTTI, Survey of International Air Travelers, 2004  
CIC Research, Inc.



Figure 1  
**TOP TEN COUNTRIES OF RESIDENCE**  
OVERSEAS VISITORS TO CALIFORNIA  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

**Table 1**  
**RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA**  
**(2004)**

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Overseas Visitors	Estimated Overseas Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
<b>EUROPE</b>	<b>9,685,918</b>	<b>53.7%</b>	<b>1,743,000</b>	<b>43.8%</b>	<b>18.0%</b>
W. EUROPE	9,305,859	51.6%	1,684,000	42.3%	18.1%
Austria	112,950	0.6%	11,000	0.3%	9.7%
Belgium	175,997	1.0%	49,000	1.2%	27.6%
Denmark	150,839	0.8%	19,000	0.5%	12.7%
France	775,274	4.3%	215,000	5.4%	27.7%
Germany	1,319,904	7.3%	275,000	6.9%	20.8%
Ireland	345,119	1.9%	38,000	1.0%	11.1%
Italy	470,805	2.6%	115,000	2.9%	24.5%
Netherlands	424,872	2.4%	115,000	2.9%	27.0%
Norway	130,400	0.7%	16,000	0.4%	12.6%
Spain	333,432	1.8%	39,000	1.0%	11.7%
Sweden	254,258	1.4%	35,000	0.9%	13.7%
Switzerland	243,186	1.3%	49,000	1.2%	20.2%
United Kingdom	4,302,737	23.9%	693,000	17.4%	16.1%
Other Western Europe	266,086	1.5%	15,000	0.4%	5.6%
E. EUROPE	380,059	2.1%	44,000	1.1%	11.6%
<b>CARIBBEAN</b>	<b>1,094,908</b>	<b>6.1%</b>	<b>4,000</b>	<b>0.1%</b>	<b>0.4%</b>
Bahamas	265,681	1.5%	--	--	--
Dominican Rep	180,048	1.0%	3,000	0.1%	1.4%
Jamaica	163,059	0.9%	1,000	0.0%	0.6%
Trinidad & Tobago	121,158	0.7%	1,000	0.0%	0.5%

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

Table 1  
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)  
(2004)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
<b>SOUTH AMERICA</b>	<b>1,645,342</b>	<b>9.1%</b>	<b>181,000</b>	<b>4.5%</b>	<b>11.0%</b>
Argentina	167,726	0.9%	22,000	0.6%	13.4%
Brazil	384,734	2.1%	78,000	2.0%	20.2%
Chile	101,171	0.6%	2,000	0.1%	1.9%
Colombia	295,371	1.6%	23,000	0.6%	7.9%
Ecuador	133,046	0.7%	8,000	0.2%	6.0%
Peru	151,409	0.8%	16,000	0.4%	10.5%
Venezuela	330,285	1.8%	22,000	0.6%	6.6%
Other South America	81,600	0.5%	10,000	0.3%	12.3%
<b>CENTRAL AMERICA (Excl'd. Mexico)</b>	<b>691,580</b>	<b>3.8%</b>	<b>68,000</b>	<b>1.7%</b>	<b>9.8%</b>
Costa Rica	127,112	0.7%	8,000	0.2%	6.2%
Guatemala	161,983	0.9%	35,000	0.9%	21.5%
Honduras	85,506	0.5%	4,000	0.1%	4.5%
Panama	76,032	0.4%	7,000	0.2%	9.4%
Other Central America	240,947	1.3%	14,000	0.4%	5.8%
Mexico (Air Arrivals Only)	1,493,971	8.3%	409,000	N.A.	27.4%
<b>AFRICA</b>	<b>240,752</b>	<b>1.3%</b>	<b>30,000</b>	<b>0.8%</b>	<b>12.5%</b>
South Africa, Rep. of	78,433	0.4%	15,000	0.4%	18.7%
Other Africa	162,319	0.9%	15,000	0.4%	9.2%
<b>OCEANIA</b>	<b>659,749</b>	<b>3.7%</b>	<b>342,000</b>	<b>8.6%</b>	<b>51.8%</b>
Australia	519,955	2.9%	259,000	6.5%	49.8%
New Zealand	127,394	0.7%	76,000	1.9%	59.5%
Other Oceania	12,400	0.1%	7,000	0.2%	56.5%

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

**Table 1**  
**RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)**  
**(2004)**

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
<b>FAR EAST</b>	<b>5,801,820</b>	<b>32.2%</b>	<b>1,607,000</b>	<b>40.3%</b>	<b>27.7%</b>
Hong Kong	123,335	0.7%	57,000	1.4%	46.3%
India	308,845	1.7%	107,000	2.7%	34.7%
Indonesia	45,905	0.3%	26,000	0.7%	56.6%
Japan	3,747,620	20.8%	630,000	15.8%	16.8%
Korea, South	626,595	3.5%	273,000	6.9%	43.5%
People's Republic of China	202,544	1.1%	101,000	2.5%	49.8%
Philippines	143,962	0.8%	109,000	2.7%	75.8%
Republic of China	297,684	1.7%	177,000	4.4%	59.6%
Singapore	106,527	0.6%	61,000	1.5%	57.5%
Thailand	66,287	0.4%	42,000	1.1%	62.7%
Other Far East	132,516	0.7%	24,000	0.6%	18.1%
<b>MIDDLE EAST</b>	<b>485,758</b>	<b>2.7%</b>	<b>98,000</b>	<b>2.5%</b>	<b>20.1%</b>
Egypt	20,772	0.1%	--	--	--
Israel	275,373	1.5%	66,000	1.7%	23.9%
Saudi Arabia	18,573	0.1%	4,000	0.1%	21.8%
Turkey	76,404	0.4%	8,000	0.2%	11.0%
Other Middle East	94,636	0.5%	20,000	0.5%	21.1%
<b>TOTAL OVERSEAS VISITORS</b> (Number of Respondents)	<b>18,026,213</b> (28,764)	<b>100.0%</b>	<b>3,984,000</b> (7,664)	<b>100.0%</b>	<b>22.1%</b>

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

\* Countries and World Region visitor volumes are independantly estimated and may not sum to total visitors.

Source: ITA Survey of International Air Travelers, 2004.

CIC Research, Inc.

**Table 2**  
**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA**  
**SHARE OF TOTAL U.S. MARKET BY COUNTRY**  
**AND VISITOR VOLUME ESTIMATE**  
**(1993 - 2004)**

**California's Share of Overseas & Mexican (Air) Visitors to the U.S.**

<b>Share</b>	<b>All Overseas</b>	<b>All Europe</b>	<b>Germany</b>	<b>United Kingdom</b>	<b>France</b>	<b>Italy</b>	<b>Other Europe</b>	<b>Mexico (air)</b>
1993	26.9%	26.0%	29.5%	22.1%	27.6%	27.8%	27.2%	29.8%
1994	27.0%	27.0%	29.5%	23.6%	26.6%	28.4%	29.1%	31.5%
1995	25.7%	26.5%	30.7%	20.5%	27.8%	30.2%	29.0%	28.8%
1996	26.5%	26.6%	28.6%	21.2%	29.8%	30.2%	29.5%	25.3%
1997	26.6%	26.0%	26.7%	21.9%	29.5%	33.0%	28.1%	23.3%
1998	25.2%	24.8%	26.5%	21.2%	34.3%	31.7%	23.9%	26.8%
1999	25.5%	24.1%	26.4%	19.2%	33.6%	30.3%	24.8%	22.0%
2000	24.5%	21.0%	22.1%	16.3%	30.4%	27.2%	22.8%	26.0%
2001	22.2%	18.2%	20.6%	15.4%	24.5%	24.9%	18.0%	30.6%
2002	21.2%	19.2%	19.8%	17.3%	25.9%	22.8%	19.3%	27.3%
2003	22.1%	20.3%	20.2%	17.6%	28.5%	18.3%	22.8%	32.3%
2004	20.7%	18.0%	20.8%	16.1%	27.7%	24.5%	15.8%	27.4%

**Estimated Volume of Visitors to California**

<b>Estimates</b>	<b>All Overseas</b>	<b>All Europe</b>	<b>Germany</b>	<b>United Kingdom</b>	<b>France</b>	<b>Italy</b>	<b>Other Europe</b>	<b>Mexico (air)</b>
1993	5,020,000	2,244,000	539,000	663,000	233,000	155,000	654,000	412,000
1994	4,984,000	2,192,000	479,000	654,000	219,000	150,000	690,000	451,000
1995	5,304,000	2,330,000	567,000	592,000	256,000	159,000	756,000	256,000
1996	6,004,000	2,588,000	571,000	688,000	294,000	159,000	876,000	276,000
1997	6,436,000	2,701,000	532,000	815,000	289,000	191,000	874,000	304,000
1998	5,972,000	2,647,000	504,000	843,000	348,000	194,000	758,000	381,000
1999	6,239,000	2,709,000	524,000	816,000	356,000	190,000	823,000	328,000
2000	6,364,000	2,435,000	395,000	767,000	330,000	167,000	776,000	452,000
2001	4,847,000	1,728,000	271,000	631,000	215,000	118,000	493,000	463,000
2002	4,053,000	1,652,000	236,000	660,000	190,000	93,000	473,000	392,000
2003	3,984,000	1,754,000	238,000	693,000	196,000	75,000	552,000	439,000
2004	4,207,000	1,743,000	275,000	693,000	215,000	115,000	445,000	409,000

**Table 2 - (Continued)**  
**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA**  
**SHARE OF TOTAL U.S. MARKET BY COUNTRY**  
**AND VISITOR VOLUME ESTIMATE**  
**(1993 - 2004)**

**California's Share of Overseas Visitors to the U.S. From Asia, Australia, and South America**

<b>Share</b>	<b>Asia</b>	<b>Japan</b>	<b>South Korea</b>	<b>Hong Kong</b>	<b>Taiwan</b>	<b>India</b>	<b>China</b>	<b>Other Far East</b>	<b>Australia</b>	<b>South America</b>
1993	34.3%	23.2%	55.5%	58.3%	68.9%	N/A	N/A	93.0%	61.5%	11.0%
1994	31.6%	20.3%	48.8%	58.2%	66.2%	39.1%	N/A	80.1%	63.2%	13.5%
1995	30.0%	20.4%	39.9%	57.8%	61.7%	38.5%	N/A	75.8%	62.2%	10.5%
1996	31.3%	22.5%	32.9%	58.0%	64.8%	45.8%	N/A	80.6%	59.1%	13.7%
1997	32.1%	23.4%	39.0%	60.0%	65.3%	35.7%	N/A	77.3%	57.2%	15.1%
1998	31.6%	23.0%	52.0%	54.5%	66.2%	42.2%	N/A	77.4%	58.5%	15.1%
1999	31.9%	22.4%	61.5%	58.7%	60.0%	38.1%	N/A	64.6%	58.6%	13.2%
2000	33.2%	21.8%	63.3%	62.1%	59.6%	40.2%	59.6%	51.7%	60.7%	11.6%
2001	32.5%	20.8%	46.3%	60.8%	65.0%	44.0%	67.9%	52.1%	52.1%	11.5%
2002	29.1%	18.0%	44.7%	54.9%	63.9%	34.0%	53.0%	48.9%	49.0%	10.2%
2003	30.5%	18.6%	49.0%	56.3%	63.3%	40.0%	44.9%	54.9%	49.4%	9.7%
2004	27.7%	16.8%	43.5%	46.3%	59.6%	34.7%	49.8%	52.9%	49.8%	11.0%

**Estimated Volume of Visitors to California**

<b>Estimates</b>	<b>Asia</b>	<b>Japan</b>	<b>South Korea</b>	<b>Hong Kong</b>	<b>Taiwan</b>	<b>India</b>	<b>China</b>	<b>Other Far East</b>	<b>Australia</b>	<b>South America</b>
1993	1,772,000	822,000	227,000	112,000	225,000	N/A	N/A	386,000	276,000	223,000
1994	1,754,000	772,000	243,000	113,000	251,000	41,000	N/A	334,000	257,000	285,000
1995	1,985,000	938,000	236,000	127,000	255,000	48,000	N/A	381,000	263,000	257,000
1996	2,348,000	1,166,000	247,000	141,000	269,000	66,000	N/A	459,000	274,000	337,000
1997	2,490,000	1,256,000	291,000	133,000	289,000	62,000	N/A	459,000	286,000	427,000
1998	2,125,000	1,124,000	189,000	116,000	256,000	89,000	N/A	351,000	270,000	447,000
1999	2,212,000	1,081,000	307,000	113,000	272,000	87,000	N/A	352,000	283,000	361,000
2000	2,508,000	1,103,000	419,000	126,000	273,000	110,000	106,000	371,000	328,000	341,000
2001	2,053,000	849,000	286,000	104,000	232,000	119,000	158,000	305,000	222,000	291,000
2002	1,656,000	653,000	285,000	74,000	184,000	87,000	120,000	253,000	199,000	185,000
2003	1,526,000	590,000	303,000	64,000	151,000	109,000	71,000	238,000	200,000	148,000
2004	1,607,000	630,000	273,000	57,000	177,000	107,000	101,000	262,000	259,000	181,000



## TABLE OF CONTENTS

	<u>Page</u>
EXECUTIVE SUMMARY: OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA .....	iii
OVERSEAS & MEXICAN VISITORS TO CALIFORNIA - HIGHLIGHTS (2004) .....	vii
OVERSEAS & MEXICAN LEISURE VISITORS TO CA - HIGHLIGHTS (2004) .....	viii
Table 1 - RESIDENCE OF VISITORS TO THE U.S. AND CALIFORNIA (2004) .....	x
Table 2 - OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA AND SHARE OF TOTAL U.S. MARKET BY COUNTRY 1993 - 2004 .....	xiii
INTRODUCTION .....	1
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA .....	2
COUNTRY OF RESIDENCE BY:	
Table 3 - MAIN DESTINATION BY STATE .....	4
Table 4 - CALIFORNIA MSAs VISITED .....	6
Table 5 - PURPOSE OF TRIP .....	9
Table 6 - LEISURE-RECREATION ACTIVITIES .....	11
Table 7 - ADVANCE TRIP DECISION .....	13
Table 8 - ADVANCE TICKET PURCHASE .....	15
Table 9 - MEANS OF BOOKING AIR TRIP AND LODGING .....	16
Table 10 - U.S. TRIP INFORMATION SOURCES .....	18
Table 11 - AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE .....	19
Table 12 - TRAVEL PARTY SIZE .....	21
Table 13 - SEX AND AGE .....	23
Table 14 - ANNUAL HOUSEHOLD INCOME .....	25
Table 15 - NIGHTS AWAY FROM HOME .....	27
Table 16 - PORT OF ENTRY .....	29
Table 17 - ACCOMMODATIONS .....	31
Table 18 - TRANSPORTATION IN THE U.S. ....	33
Table 19 - EXPENDITURES .....	35
Table 20 - CALIFORNIA ONLY EXPENDITURES .....	36
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA .....	37
Table 21 - RESIDENCE OF OVERSEAS AND MEXICAN LEISURE VISITORS .....	38
LEISURE TRAVELERS COUNTRY OF RESIDENCE BY:	
Table 22 - MAIN DESTINATION BY STATE .....	41
Table 23 - PURPOSE OF TRIP .....	42

# TABLE OF CONTENTS

## (Continued)

	<u>Page</u>
Table 24 - LEISURE-RECREATION ACTIVITIES .....	43
Table 25 - ADVANCE TRIP DECISION.....	44
Table 26 - MEANS OF BOOKING AIR TRIP AND LODGING.....	45
Table 27 - TRIP INFORMATION SOURCES.....	46
Table 28 - AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE .....	47
Table 29 - TRAVEL PARTY SIZE .....	48
Table 30 - SEX AND AGE .....	49
Table 31 - ANNUAL HOUSEHOLD INCOME .....	50
Table 32 - NIGHTS AWAY FROM HOME .....	51
Table 33 - PORT OF ENTRY.....	52
Table 34 - ACCOMMODATIONS.....	53
Table 35 - TRANSPORTATION IN THE U.S.....	54
Table 36 - TRIP EXPENDITURES.....	55
Table 37 - CALIFORNIA ONLY EXPENDITURES .....	56
APPENDIX A - Survey Background.....	57
APPENDIX B - Questionnaire.....	59
APPENDIX C - World by Region and Country or Territory .....	68





## LIST OF FIGURES

<u>Figure</u>		<u>Page</u>
1	TOP TEN COUNTRIES OF RESIDENCE .....	ix
2	MAIN STATE DESTINATION .....	3
3	TOP TEN MSA DESTINATIONS .....	5
4	PURPOSE OF U.S. TRIP .....	8
5	LEISURE RECREATION ACTIVITIES .....	10
6	ADVANCE TRIP DECISION .....	12
7	ADVANCE AIRLINE DECISION .....	14
8	TRAVEL INFORMATION SOURCES .....	17
9	TRAVEL PARTY SIZE .....	20
10	GENDER OF OVERSEAS AND MEXICAN VISITORS .....	22
11	INCOME PROFILE OF OVERSEAS AND MEXICAN VISITORS .....	24
12	TOTAL NIGHTS IN THE U.S. ....	26
13	PORT OF ENTRY OF OVERSEAS AND MEXICAN VISITORS .....	28
14	OVERSEAS AND MEXICAN VISITORS' ACCOMMODATIONS .....	30
15	TRANSPORTATION WITHIN THE U.S. ....	32
16	TRIP EXPENDITURES .....	34



## INTRODUCTION

This report on overseas visitors to California is based on data compiled from the 2004 Office of Travel & Tourism Industries (OTTI) "Survey of International Air Travelers." The survey is conducted by CIC Research, Inc. in cooperation with over 50 major airlines on a sample of their international flights departing from U.S. airports. The survey information is collected from passengers through questionnaires covering traveler demographics, trip activities, places visited and travel expenditures. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used by the public and private sectors to guide strategic planning and marketing to international air travelers.

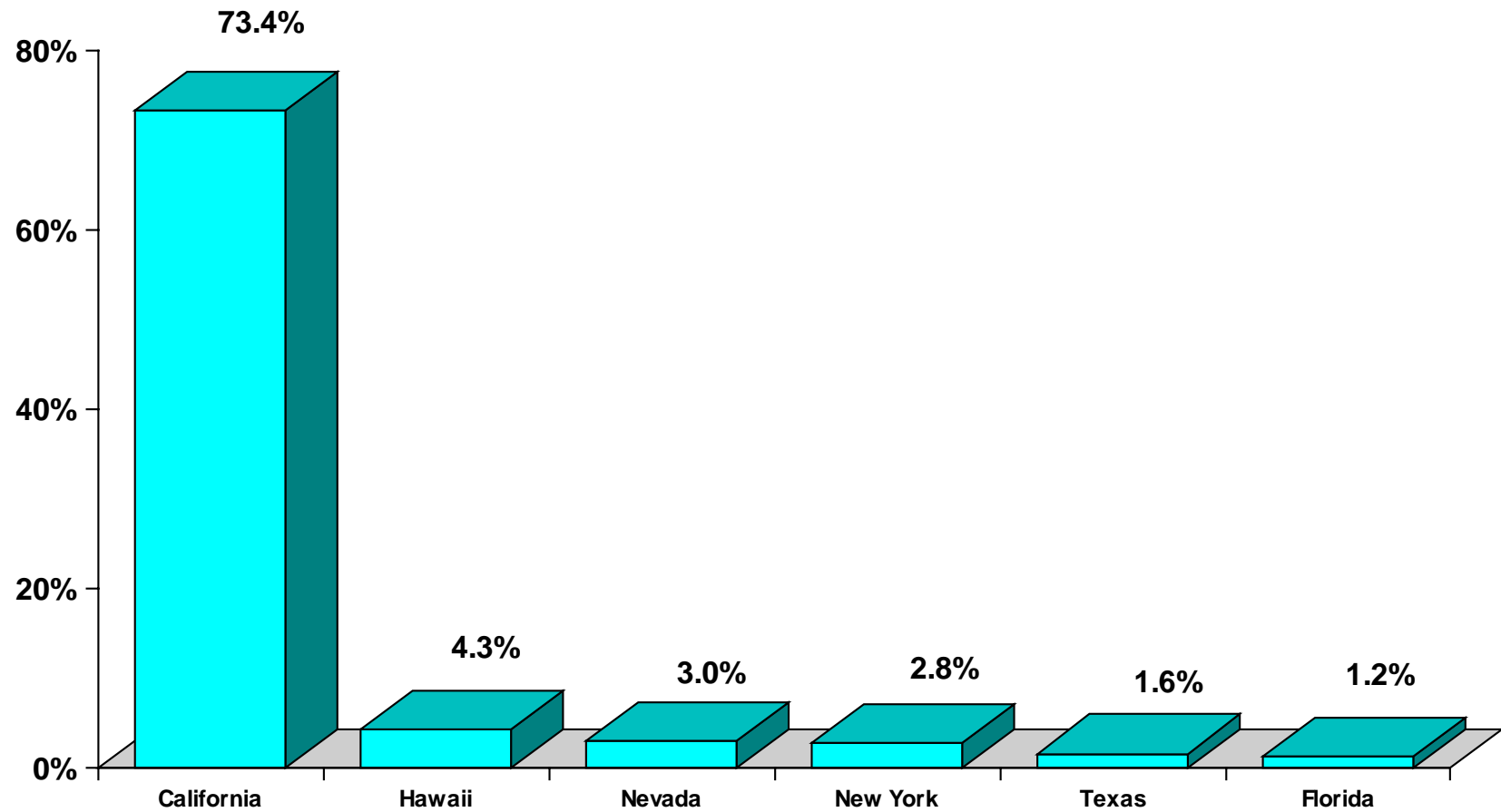
More than 7,664 survey respondents reported a California visit in 2004. This is a very robust sample size, providing a unique opportunity to evaluate the characteristics of the international visitor market. However, since airline participation is voluntary and varies from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data may not fully represent the market's international travel to California.

With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the U.S. Department of Homeland Security. Passengers on most charter flights and passengers traveling by air between the U.S. and Canada are excluded. Travelers to the U.S. from Mexico arriving on an international flight have been included in the 2004 report. However, most travelers from Mexico to California arrive in the U.S. through a land port of entry. A more detailed explanation of the survey methodology appears in Appendix A and a copy of the survey questionnaire in Appendix B.



**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

Figure 2  
**MAIN STATE DESTINATION**  
OVERSEAS VISITORS TO CALIFORNIA  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 3

**MAIN DESTINATION BY STATE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

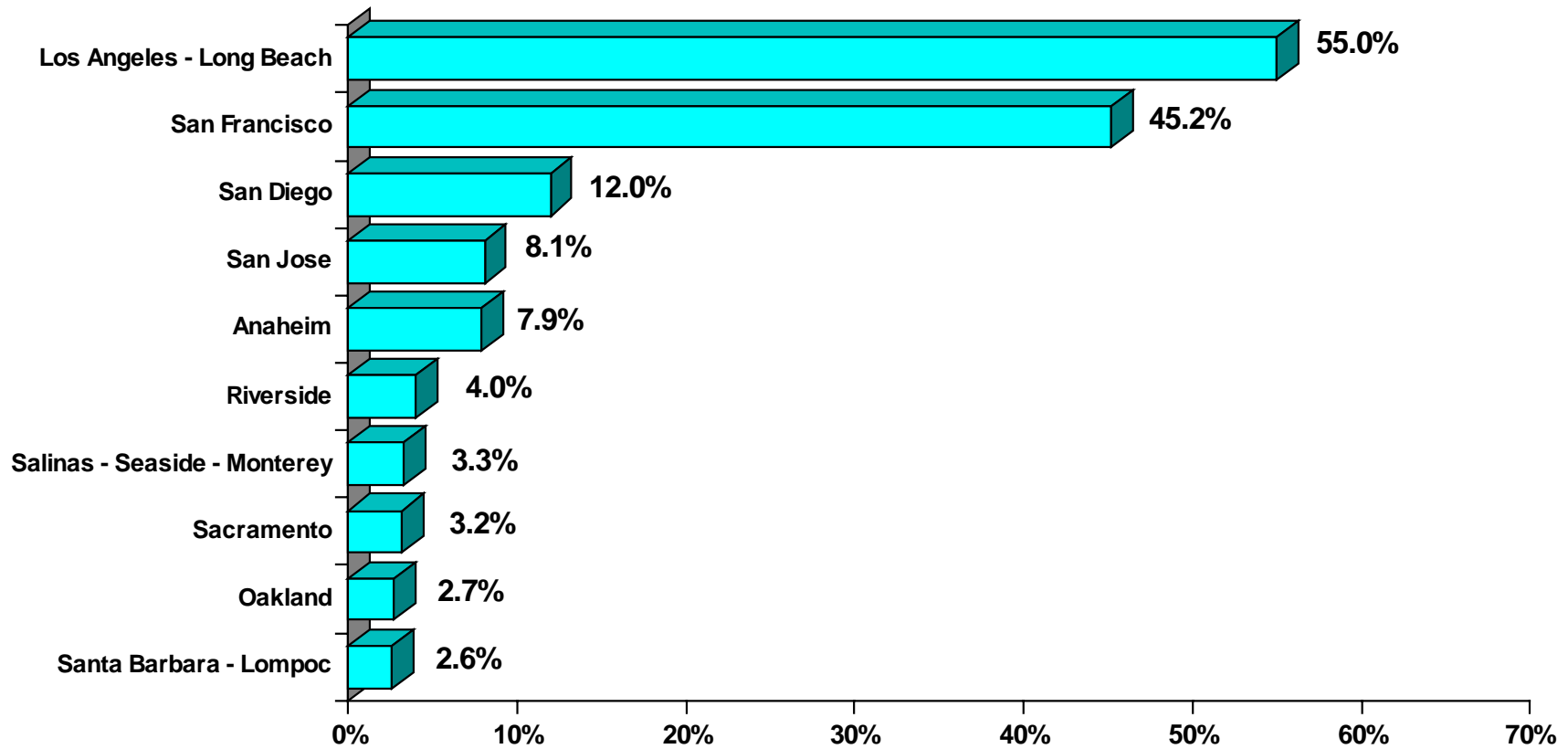
- Almost three in four (73%) overseas visitors to California indicated that California was their main destination on their U.S. trip.
- Of all overseas visitors to California, Mexico (air) visitors (89%) and Japanese visitors (84%) reported the highest proportion with California as their main state of destination in the U.S.

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	AUSTRALIA/ NEW ZEALAND					SOUTH KOREA	02-04	03-04 INDIA	MEXICO (AIR)
				GERMANY	SOUTH AMERICA	FRANCE	TAIWAN	CHINA w/o HK				
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(5,611)	(1,528)	(687)	(199)	(749)	(151)	(134)	(755)	(189)	(118)	(277)	(190)
California	73.4%	83.5%	68.3%	76.0%	42.1%	62.2%	79.8%	81.6%	82.5%	57.6%	77.1%	89.2%
Hawaiian Islands	4.3	1.9	10.2	9.1	3.5	7.5	1.5	0.3	-	4.9	-	2.4
Nevada	3.0	3.9	5.4	2.8	2.0	3.4	1.9	2.3	2.6	2.2	1.0	0.8
New York	2.8	1.7	1.3	1.7	7.5	2.5	0.4	0.7	4.4	2.9	8.0	0.1
Florida	1.6	0.5	2.0	0.8	1.3	7.8	-	0.5	1.9	2.7	0.2	0.6
Texas	1.2	0.5	0.2	0.3	1.9	2.5	2.2	1.3	-	1.9	1.8	0.2

\*Visitors may report only one destination -- States with less than 1% response were not listed.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

**Figure 3**  
**TOP TEN MSA DESTINATIONS**  
OVERSEAS VISITORS TO CALIFORNIA  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 4

**CALIFORNIA MSAs VISITED  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA\*  
(2004)**

- The most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California were Los Angeles – Long Beach (55%), San Francisco (45%), San Diego (12%), San Jose (8%), and Anaheim – Santa Ana (8%).

METROPOLITAN STATISTICAL AREA*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	4,207,000 (7,502)	630,000 (1,949)	693,000 (864)	275,000 (245)	335,000 (1,100)	181,000 (191)	215,000 (170)	177,000 (1,056)	273,000 (234)	100,000 (177)	115,000 (340)	409,000 (199)
Los Angeles-Long Beach	2,314,000 55.0%	351,000 55.7%	343,000 49.5%	145,000 52.9%	222,000 66.4%	109,000 60.2%	81,000 37.6%	108,000 61.1%	123,000 45.2%	54,000 53.5%	50,000 43.9%	199,000 48.6%
Universal Studios	42,000 1.0%	7,000 1.1%	1,000 0.2%	1,000 0.5%	3,000 0.9%	1,000 0.3%	- -	1,000 0.4%	1,000 0.3%	- -	- -	23,000 5.6%
Hollywood	38,000 0.9%	5,000 0.8%	15,000 2.1%	- -	4,000 1.1%	1,000 0.7%	1,000 0.3%	1,000 0.7%	- -	1,000 0.6%	- -	2,000 0.4%
San Francisco	1,902,000 45.2%	217,000 34.5%	368,000 53.1%	171,000 62.2%	106,000 31.5%	70,000 38.8%	112,000 51.9%	67,000 37.8%	150,000 55.0%	47,000 46.6%	55,000 47.8%	96,000 23.5%
San Diego	509,000 12.1%	71,000 11.3%	81,000 11.7%	39,000 14.1%	43,000 12.7%	21,000 11.4%	29,000 13.7%	13,000 7.3%	23,000 8.5%	5,000 4.7%	9,000 7.5%	41,000 10.1%
Sea World, CA	13,000 0.3%	- -	1,000 0.1%	- -	1,000 0.2%	2,000 0.9%	- -	- -	<1,000 0.1%	- -	1,000 0.9%	- -
San Jose	341,000 8.1%	48,000 7.6%	39,000 5.6%	24,000 8.9%	9,000 2.8%	5,000 2.9%	29,000 13.7%	25,000 14.4%	51,000 18.6%	15,000 15.2%	25,000 21.4%	19,000 4.7%
Anaheim-Santa Ana	332,000 7.9%	66,000 10.4%	44,000 6.3%	6,000 2.1%	51,000 15.3%	7,000 3.8%	9,000 4.4%	8,000 4.3%	32,000 11.6%	4,000 4.1%	6,000 5.3%	78,000 19.0%
Disneyland	63,000 1.5%	14,000 2.2%	8,000 1.2%	1,000 0.4%	12,000 3.5%	1,000 0.6%	- -	2,000 1.3%	2,000 0.6%	- -	1,000 1.0%	48,000 11.7%

Table 4 (continued)

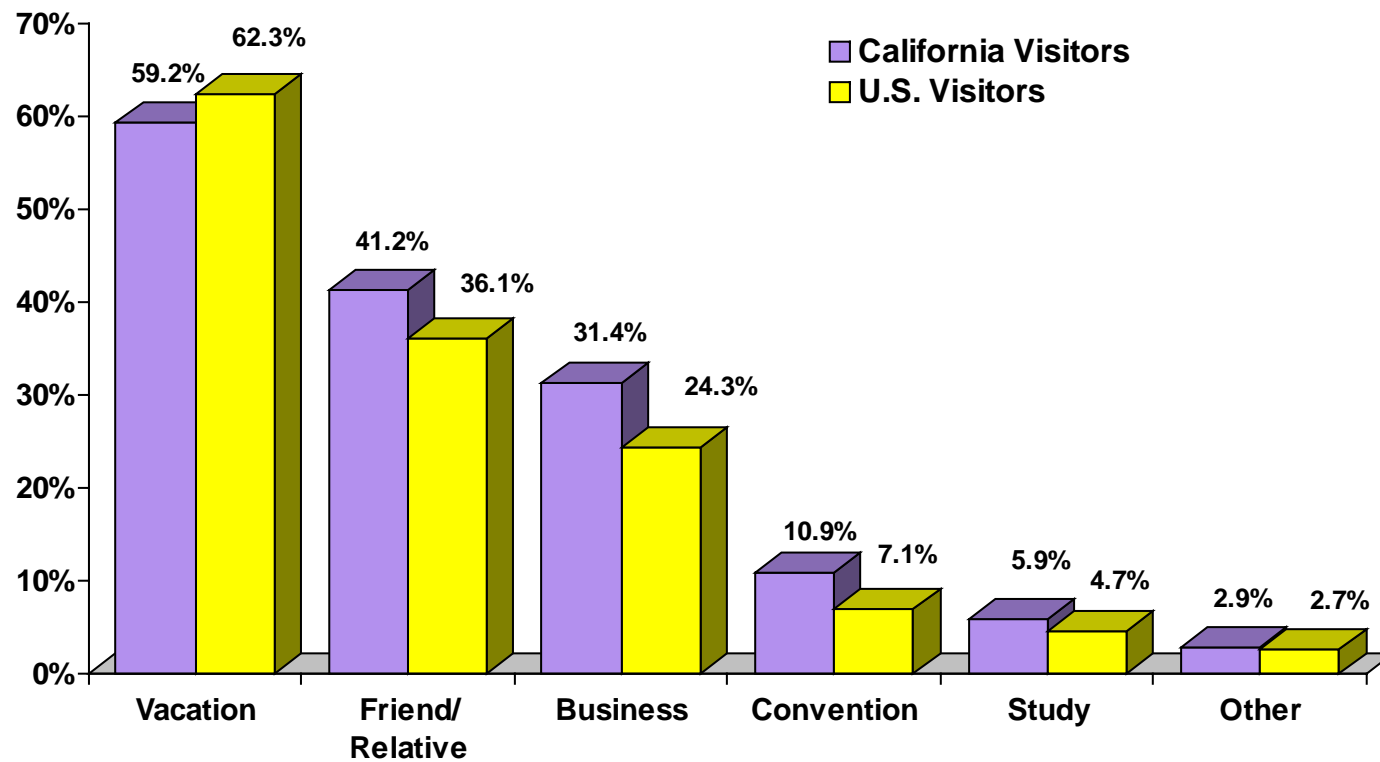
COUNTRY OF RESIDENCE OF VISITORS												
METROPOLITAN STATISTICAL AREA*	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	4,207,000 (7,502)	630,000 (1,949)	693,000 (864)	275,000 (245)	335,000 (1,100)	181,000 (191)	215,000 (170)	177,000 (1,056)	273,000 (234)	100,000 (177)	115,000 (340)	409,000 (199)
Knott's Berry Farm	8,000 0.2%	1,000 0.1%	- -	- -	3,000 0.8%	- -	- -	<1,000 0.1%	1,000 0.2%	- -	- -	- -
Salinas-Seaside-Monterey	139,000 3.3%	14,000 2.3%	36,000 5.2%	14,000 5.1%	7,000 2.0%	4,000 2.3%	12,000 5.5%	4,000 2.2%	2,000 0.8%	- -	<1,000 0.2%	9,000 2.3%
Sacramento	135,000 3.2%	10,000 1.6%	30,000 4.3%	18,000 6.4%	8,000 2.4%	5,000 2.8%	9,000 4.1%	3,000 1.5%	16,000 5.9%	4,000 3.8%	3,000 2.5%	11,000 2.6%
Riverside-San Bernardino	168,000 4.0%	13,000 2.1%	58,000 8.4%	22,000 8.0%	7,000 2.1%	4,000 2.3%	18,000 8.5%	1,000 0.4%	1,000 0.4%	1,000 0.8%	1,000 0.8%	11,000 2.8%
Oakland	114,000 2.7%	9,000 1.5%	17,000 2.4%	15,000 5.6%	3,000 0.8%	10,000 5.6%	6,000 2.8%	6,000 3.6%	7,000 2.6%	7,000 7.2%	7,000 5.9%	7,000 1.7%
Santa Barbara-Lompoc	109,000 2.6%	5,000 0.8%	29,000 4.2%	22,000 8.0%	8,000 2.4%	1,000 0.5%	12,000 5.4%	1,000 0.4%	1,000 0.2%	<1,000 0.4%	- -	7,000 1.7%

\*Visitors may report multiple destinations -- percentages are read down the column. Counties with less than a 2% share of the California market were not listed.

Volume estimates by MSA were adjusted for non-response and will differ slightly from the estimates reported by ITA.



Figure 4  
**PURPOSE OF U.S. TRIP**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 5

**PURPOSE OF TRIP  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Almost six in ten (59%) overseas visitors to California reported visiting for vacation/holiday purposes, while almost half were visiting friends/relatives (41%) and one-third or were on business (31%). Visitors to California attending a convention accounted for 11 percent. Visitors may list more than one purpose of their trip.
- Visitors from the U.K., Australia/New Zealand and Mexico (air) indicated high proportions of vacationing during their U.S. trip.
- When compared with visitors from other countries, visitors to California from South Korea reported a high proportion of visiting for the purpose of attending a convention (25%) and studying (18%).

PURPOSE OF TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,640)	(1,960)	(877)	(254)	(1,121)	(192)	(175)	(1,087)	(236)	(174)	(351)	(204)
Vacation/Holidays	59.2%	52.4%	78.0%	59.0%	71.0%	44.5%	56.5%	52.7%	48.9%	45.8%	34.1%	65.3%
Visit Friends/Relatives	41.2	27.8	34.5	31.0	47.5	51.3	39.0	53.2	39.7	39.5	58.2	48.4
Business/Professional	31.4	35.2	17.6	31.5	24.0	31.1	35.9	37.9	38.3	56.9	52.0	22.7
Attend A Convention	10.9	16.1	3.2	9.6	14.1	11.7	8.9	13.1	17.5	12.1	10.5	7.8
Study/Teaching	5.9	7.6	1.2	4.5	3.4	6.4	4.5	8.0	18.2	7.0	1.9	0.3
Other	2.9	3.2	1.6	3.8	3.7	2.5	0.0	1.6	7.1	3.0	2.8	3.3

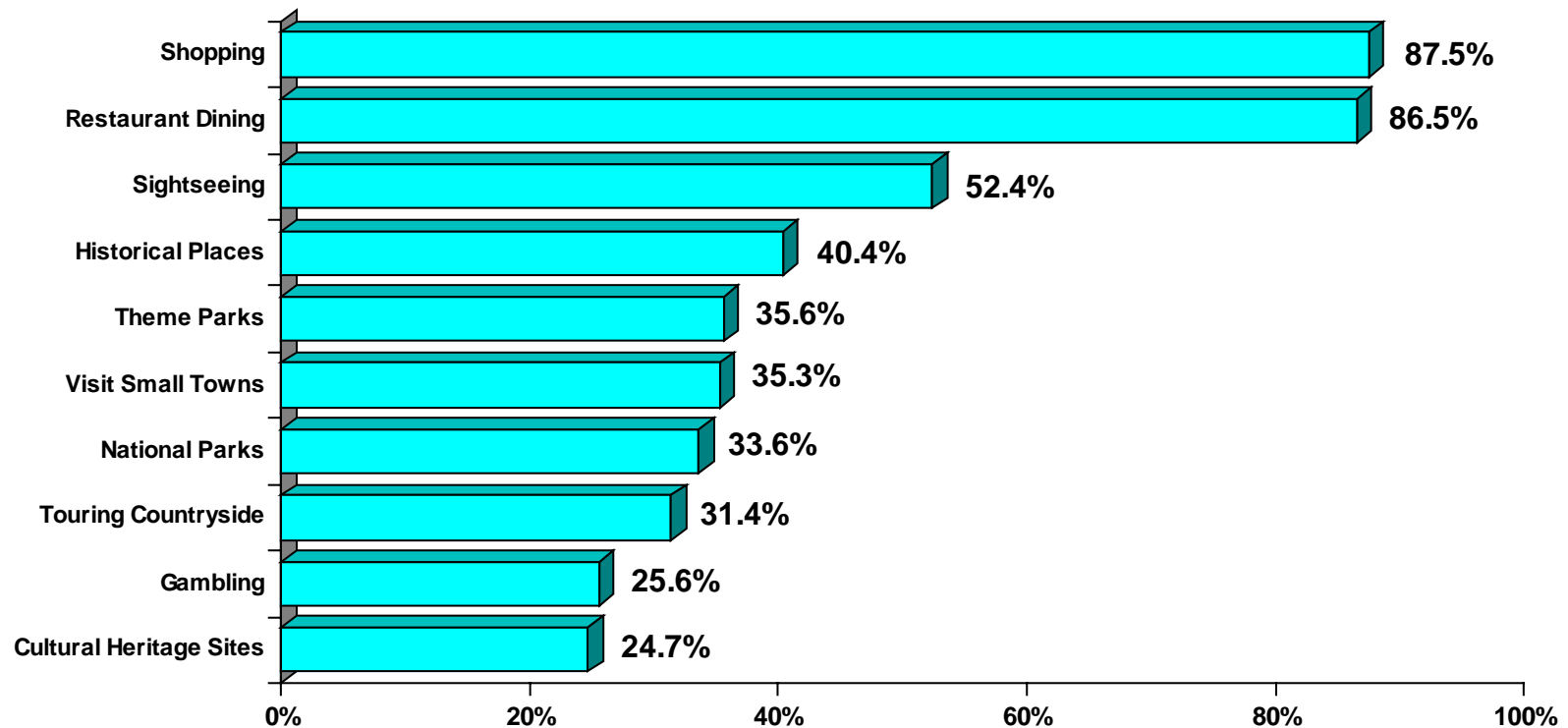
\*Column percentages may total more than 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Figure 5

# LEISURE RECREATION ACTIVITIES

OVERSEAS VISITORS TO CALIFORNIA  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 6  
**LEISURE-RECREATION ACTIVITIES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

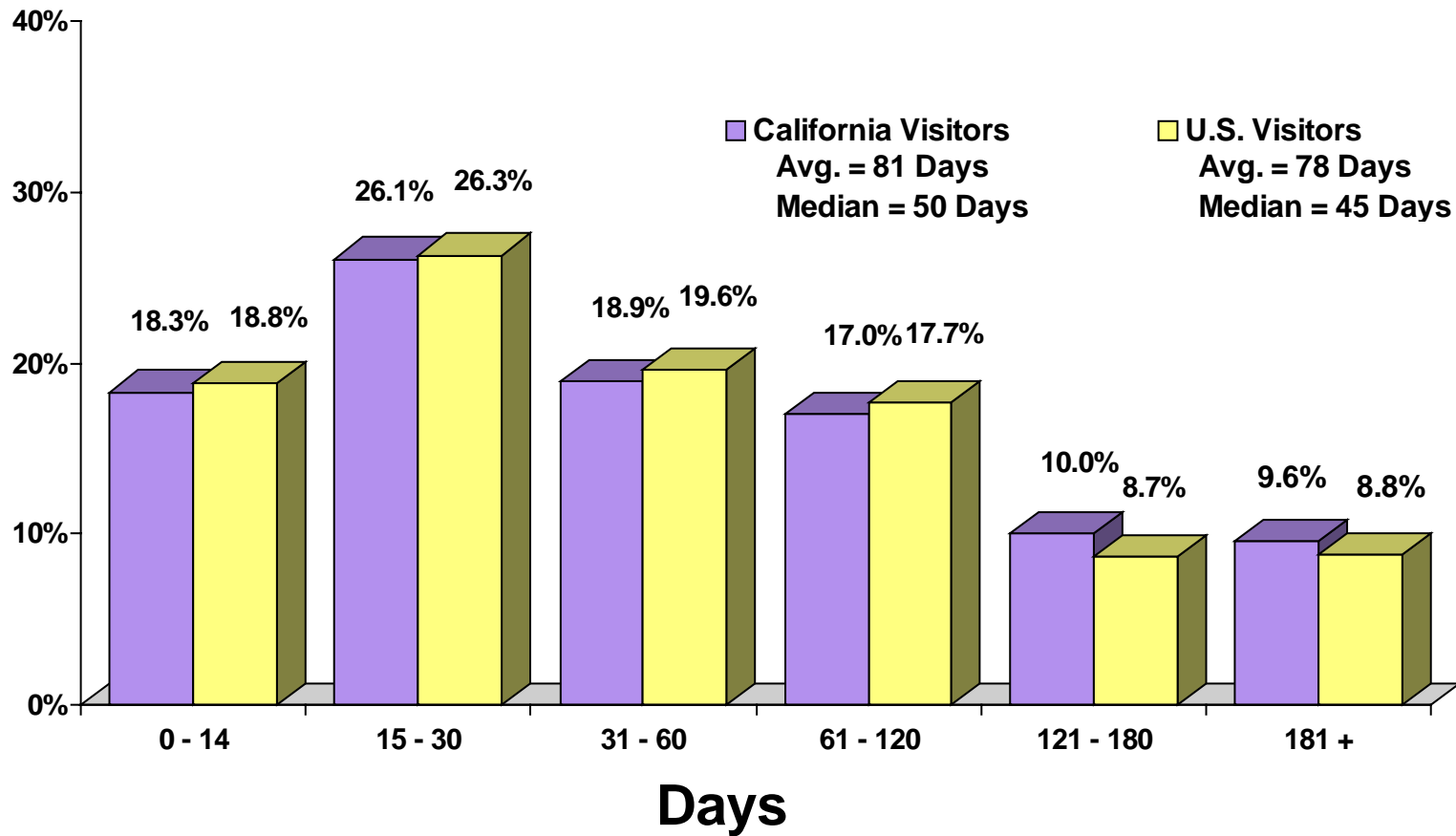
- Shopping (88%), dining in restaurants (87%) followed by sightseeing (52%) were the most common leisure and recreation activities of overseas visitors to California.
- Visitors from Australia/New Zealand (92%) had the highest proportion of respondents who mentioned shopping as one their favorite activities. Visitors from Australia/New Zealand as well as from the U.K. and France, had the highest proportion of respondents who mentioned sightseeing in cities (64%, 62% and 52% each respectively).

LEISURE/RECREATION ACTIVITIES*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,141)	(1,808)	(827)	(240)	(1,065)	(162)	(161)	(1,022)	(218)	(162)	(331)	(171)
Shopping	87.5%	84.5%	89.4%	81.7%	92.2%	82.2%	82.2%	89.6%	79.5%	95.1%	86.7%	86.3%
Dining in Restaurants	86.5	87.0	93.2	89.1	89.1	81.4	87.7	75.4	62.0	82.3	76.7	71.2
Sightseeing in Cities	52.4	48.0	62.3	41.9	63.9	33.7	52.2	50.8	42.3	54.6	49.9	24.8
Visit Historical Places	40.4	11.8	53.3	49.5	53.3	34.1	49.1	28.5	23.3	47.6	44.4	32.0
Amusement/Theme Parks	35.6	26.4	34.5	31.1	45.4	29.5	26.5	36.6	36.0	35.8	36.0	42.3
Visit Small Towns	35.3	29.4	42.3	33.7	39.3	40.6	40.6	22.6	23.3	24.3	16.9	24.4
Visit National Parks	33.6	16.9	44.0	49.7	31.4	22.9	46.6	26.9	29.3	33.7	31.6	19.5
Touring Countryside	31.4	12.2	42.4	49.6	42.9	19.9	34.4	15.6	21.0	19.7	22.3	14.2
Casinos/Gambling	25.6	16.0	34.3	20.8	26.2	18.0	27.4	25.0	22.2	23.3	24.0	14.6
Cultural Heritage Sites	24.7	8.7	34.1	38.1	31.4	20.2	27.6	15.2	30.9	29.9	15.7	14.3
Guided Tours	22.8	18.1	34.9	16.6	32.7	19.4	17.6	22.2	27.7	18.2	12.1	11.2
Art Gallery/Museum	21.1	10.5	26.4	12.4	29.8	24.7	26.8	13.7	17.4	27.2	14.7	16.0
Water Sports/Sunbathing	17.0	5.9	30.5	21.8	19.9	13.8	24.5	8.2	4.1	13.9	5.1	3.3
Concert/Play/Musical	14.8	8.7	17.2	11.3	21.7	21.3	12.1	8.1	16.3	10.8	10.8	15.3
Nightclubs/Dancing	12.7	6.0	15.8	14.4	18.4	18.0	14.7	6.3	11.3	10.7	11.3	9.5
Camping/Hiking	7.9	3.4	7.4	16.2	8.4	4.5	14.3	2.5	2.8	7.4	3.0	0.5
Golfing/Tennis	7.0	9.2	7.7	5.8	6.1	0.3	6.2	6.8	17.2	5.1	4.3	2.0
Visit Am. Indian Comm.	6.8	2.2	10.3	8.9	6.6	1.6	10.9	2.1	2.8	3.9	15.4	0.3
Ethnic Heritage Sites	6.6	2.3	11.5	3.6	5.9	1.3	10.7	2.9	7.4	13.2	5.1	2.8
Attend Sports Event	6.4	5.5	7.1	7.2	14.1	7.4	1.2	3.4	5.5	7.6	2.2	3.9
Cruises	5.5	3.6	5.4	3.2	10.6	2.1	3.0	9.0	13.0	10.4	8.3	4.1
Environ./Eco. Excursions	5.0	1.2	7.5	2.2	3.4	4.3	16.4	8.0	3.0	3.7	3.4	3.6
Snow Skiing	2.7	0.4	3.0	2.3	5.5	4.9	1.5	2.1	3.8	7.1	3.1	0.5
Ranch Vacations	1.8	1.1	2.2	1.3	1.2	1.3	1.8	3.3	1.8	12.7	0.8	0.7
Hunting/Fishing	1.2	0.5	0.5	0.5	1.7	0.2	1.5	0.6	4.6	2.1	1.4	0.2

\*Multiple response. Only responses 1.0 percent or greater are detailed.

Source: ITA/OTI Survey of International Air Travelers, 2004. CIC Research, Inc.

**Figure 6**  
**ADVANCE TRIP DECISION**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 7

**ADVANCE TRIP DECISION  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

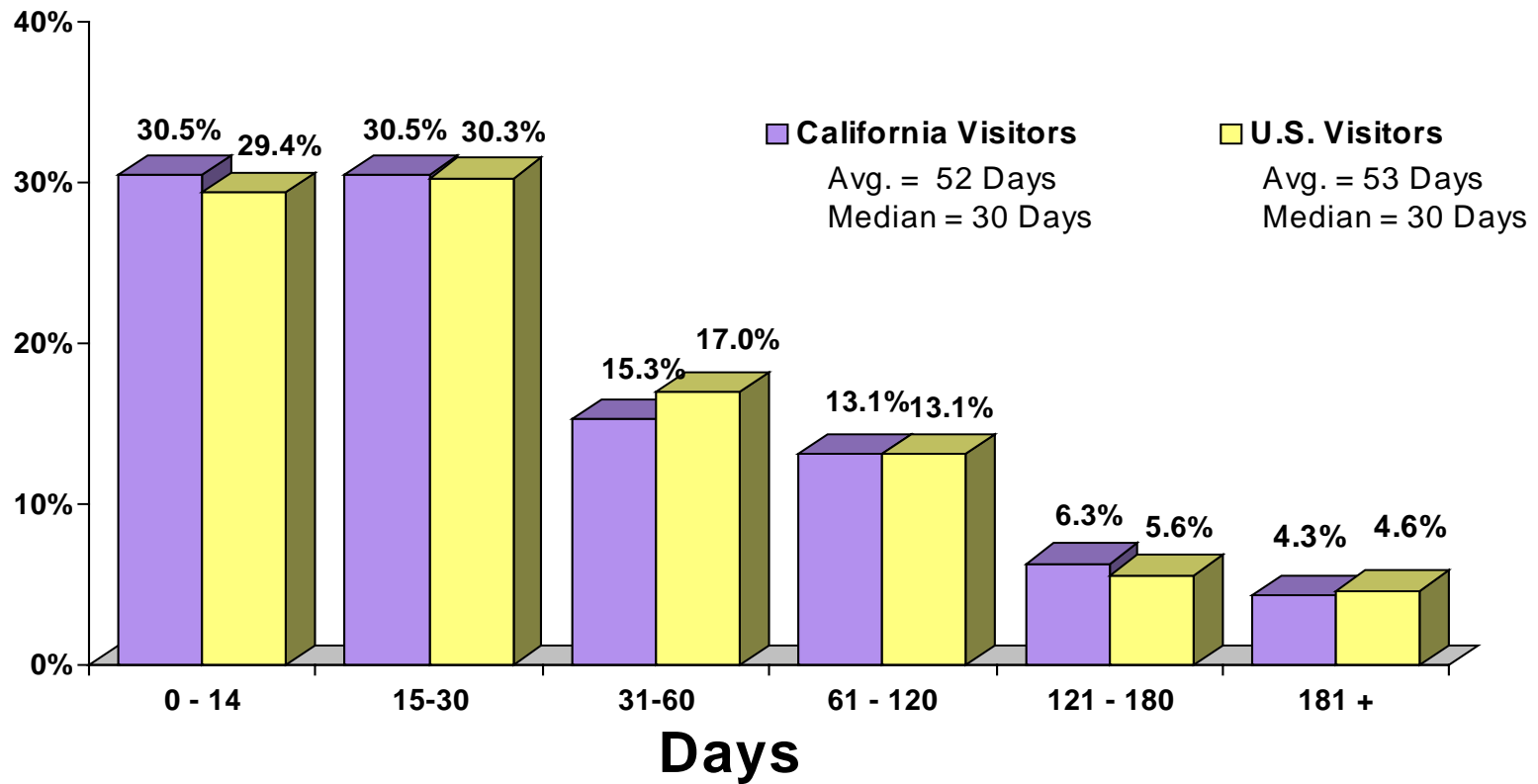
- The median time period for overseas visitors' decision to travel was 50 days before the actual trip, compared to 40 days in 2003.
- Respondents from the U.K. and Australia/New Zealand had the longest planning time frame at a median of 90 days, and visitors from Mexico (air) had the shortest planning time frame at a median of 21 days.

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,205)	(1,845)	(837)	(242)	(1,080)	(178)	(168)	(1,028)	(224)	(167)	(315)	(192)
14 Days or Less	18.3%	22.7%	12.8%	14.6%	8.2%	15.3%	15.8%	33.4%	27.7%	17.6%	22.7%	36.8%
15 - 30 Days	26.1	32.2	13.4	17.7	12.2	40.0	22.6	34.2	39.4	45.9	37.3	29.8
31 - 60 Days	18.9	24.3	13.8	17.6	19.3	20.8	19.9	21.9	14.5	15.2	19.3	18.7
61 - 120 Days	17.0	12.9	23.4	23.0	24.0	14.7	15.4	7.4	7.8	14.2	14.1	9.2
121 - 180 Days	10.0	4.2	15.9	13.1	14.5	8.1	16.8	2.6	7.1	4.6	6.6	2.9
181 or More Days	9.6	3.6	20.7	14.0	21.9	1.0	9.5	0.5	3.6	2.6	-	2.8
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Average No. of Days	81.1	54.3	123.9	101.8	132.2	53.5	88.2	36.9	50.3	49.6	44.9	38.6
Median No. of Days	50.0	30.0	90.0	64.0	90.0	30.0	60.0	30.0	30.0	30.0	30.0	20.0

\*Column percentages may not total 100 percent due to rounding.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.  
CIC Research, Inc.

**Figure 7**  
**ADVANCE AIRLINE DECISION**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 8

**ADVANCE TICKET PURCHASE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- An overseas visitor committed to an airline ticket purchase a median of 30 days prior to the actual trip. About four percent of travelers booked their airline reservations six months or more in advance of their trip.
- Visitors from the United Kingdom and Australia/New Zealand booked their airline tickets a median of 2 months or more in advance. By contrast, visitors from Mexico and South Korea only booked airline tickets a median of 10 days in advance of their U.S. trip.

COUNTRY OF RESIDENCE OF VISITORS												
ADVANCE AIRLINE RESERVATIONS*	TOTAL OVERSEAS	AUSTRALIA/ NEW ZEALAND								02-04		MEXICO (AIR)
		JAPAN	U.K.	GERMANY	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	03-04 INDIA		
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(6,875)	(1,662)	(793)	(238)	(1,066)	(166)	(159)	(998)	(222)	(162)	(303)	(188)
14 Days or less	30.5%	37.7%	19.0%	25.9%	14.2%	23.1%	19.5%	54.8%	54.0%	48.0%	44.2%	55.0%
15 - 30 Days	30.5	36.0	19.4	22.6	21.4	56.7	34.7	33.5	30.4	43.0	38.1	25.5
31 - 60 Days	15.3	16.4	12.4	15.1	23.1	15.9	19.7	9.1	11.3	4.3	11.8	17.7
61 - 120 Days	13.1	7.1	21.9	19.7	27.4	4.1	13.5	1.9	2.0	-	5.2	1.1
121 - 180 Days	6.3	2.3	14.3	10.7	8.0	-	5.7	0.5	0.2	0.7	0.6	0.6
181 or More Days	4.3	0.4	13.0	6.0	5.8	0.2	6.9	0.2	2.1	-	-	-
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	52.1	32.2	94.0	66.0	74.9	27.6	57.8	20.2	22.8	19.9	23.2	18.9
Median No. of Days	30.0	24.0	60.0	40.0	60.0	21.0	30.0	14.0	10.0	15.0	15.0	10.0



Table 9

**MEANS OF BOOKING AIR TRIP AND LODGING  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Approximately six in ten overseas visitors to California used a travel agent to make airline reservations (59%). In comparison, one quarter (27%) of visitors used a travel agent to make lodging arrangements. Visitors from Australia/New Zealand reported the highest use of travel agents in booking their air trip (78%) and the highest use of travel agents in booking their lodging (41%).

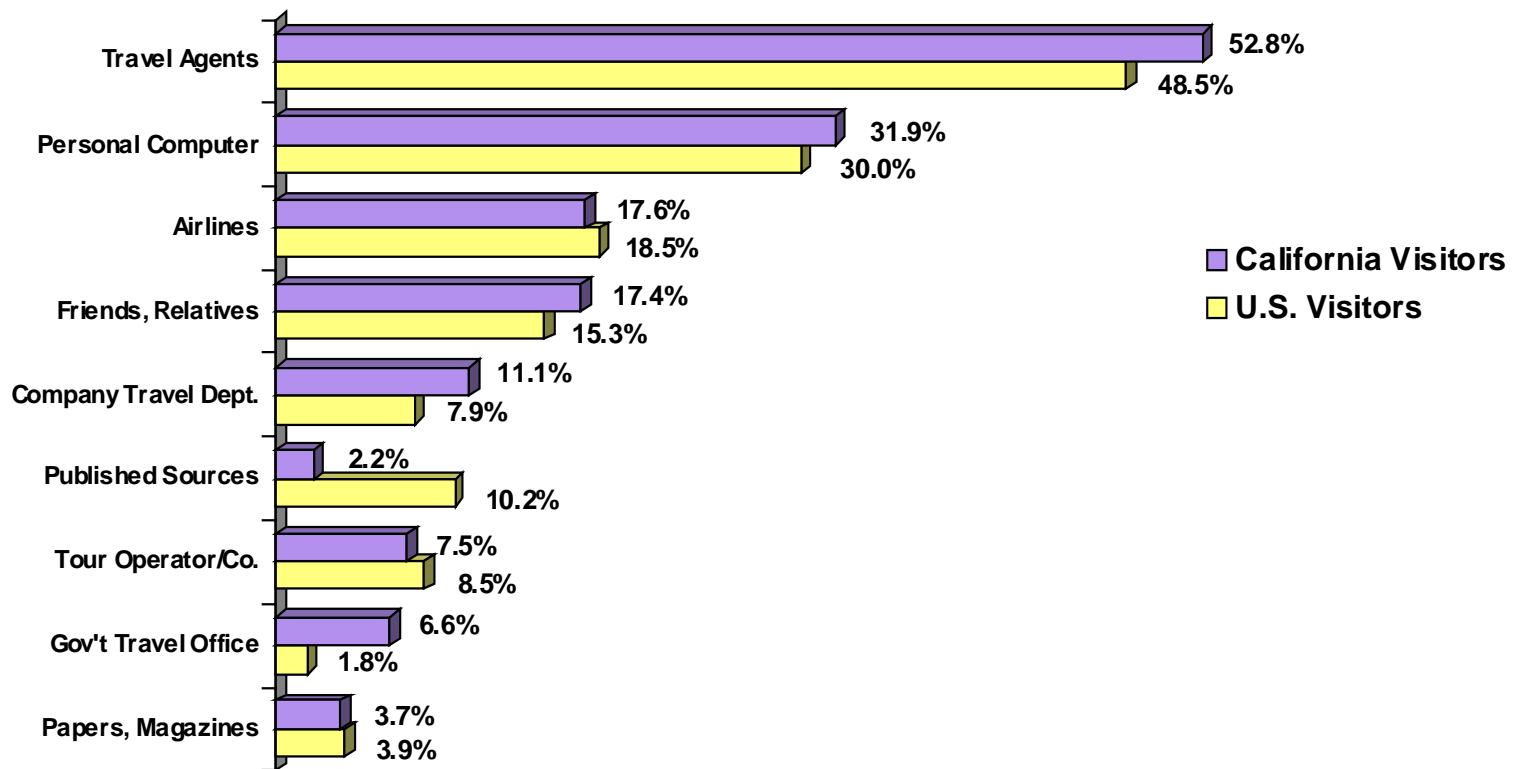
COUNTRY OF RESIDENCE OF VISITORS												
MEANS OF BOOKING AIR TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,483)	(1,934)	(864)	(246)	(1,101)	(189)	(169)	(1,059)	(235)	(166)	(340)	(203)
Travel Agent	58.9%	56.7%	44.5%	57.9%	77.9%	54.9%	50.0%	66.6%	64.7%	46.4%	72.5%	53.6%
Airline Directly	11.2	10.4	13.3	12.1	9.5	20.6	12.6	5.9	8.1	20.5	5.1	28.8
Company Travel Dept.	11.4	15.6	6.4	12.5	4.6	5.3	21.8	10.8	16.7	20.1	19.1	5.0
Personal Computer	10.0	7.7	20.0	12.5	2.8	10.0	11.3	6.4	5.5	5.4	2.2	9.6
Tour Operator	6.0	7.2	12.5	2.0	2.7	6.4	2.1	7.7	1.3	4.5	0.5	0.2
Travel Club	0.4	0.1	0.8	0.6	0.6	-	0.2	0.4	1.3	0.1	-	0.4
Don't Know/Other	2.1	2.4	2.5	2.6	1.8	2.8	2.0	2.1	2.5	3.1	0.7	2.4
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>MEANS OF BOOKING LODGING</b>												
(Number of Respondents)	(7,492)	(1,898)	(866)	(251)	(1,110)	(183)	(171)	(1,082)	(233)	(172)	(345)	(196)
<b>Yes, Booked by**</b>	<b>67.3%</b>	<b>81.9%</b>	<b>71.7%</b>	<b>67.9%</b>	<b>70.4%</b>	<b>52.4%</b>	<b>61.6%</b>	<b>55.0%</b>	<b>69.8%</b>	<b>62.7%</b>	<b>50.5%</b>	<b>53.0%</b>
Travel Agent	27.1%	30.9%	24.9%	27.6%	40.8%	16.7%	28.6%	26.8%	24.7%	26.4%	9.9%	23.8%
Hotel/Motel Directly	10.4	14.3	15.6	13.4	11.7	7.6	7.1	1.4	2.5	1.6	3.2	4.5
Other	10.4	9.0	13.7	8.9	11.4	6.8	5.7	5.4	15.9	4.6	7.1	2.6
Company Travel Dept.	9.3	12.3	6.0	12.9	5.4	6.6	15.2	8.8	6.1	21.0	19.8	6.1
Tour Operator	6.1	6.4	13.2	3.8	3.9	4.7	2.9	5.4	4.2	2.2	0.3	0.4
Business Associate	5.3	9.1	2.1	4.3	2.8	4.1	3.7	4.0	12.3	2.8	6.3	1.5
Friend or Relative	5.2	6.9	4.2	3.2	4.0	8.8	1.9	4.5	6.6	6.0	7.9	7.6
Airline Staff	1.2	0.7	1.3	0.6	1.3	2.0	0.6	1.5	0.1	4.4	1.8	6.6
<b>No</b>	<b>32.7%</b>	<b>18.1%</b>	<b>28.3%</b>	<b>32.1%</b>	<b>29.6%</b>	<b>47.6%</b>	<b>38.4%</b>	<b>45.0%</b>	<b>30.2%</b>	<b>37.3%</b>	<b>49.5%</b>	<b>47.0%</b>

\*Column percentages may not total to 100 percent due to rounding.

\*\* Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2004  
CIC Research, Inc.

**Figure 8**  
**TRAVEL INFORMATION SOURCES**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2004)



Source: ITA "In-Flight" Survey, 2004  
 CIC Research, Inc.

Table 10

**U.S. TRIP INFORMATION SOURCES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Consistent with previous years, the majority of the overseas travelers to California (53%) used information from travel agencies to plan their trip. The usage of a personal computer (i.e., the Internet) increased from 30% in 2003 to 32% this year. Travelers who called the airlines directly (18%) and those who relied on friends/relatives (17%), rounded out the top four information sources.
- Visitors from Australia/New Zealand (72%) and those from India (63%) showed the highest use of travel agencies as information sources. A personal computer was the second highest source of information for overseas travelers. British (38%), Japanese (34%), and South Korean travelers (34%) all reported high computer usage.

INFORMATION SOURCES*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,583)	(1,930)	(869)	(253)	(1,118)	(194)	(174)	(1,077)	(237)	(173)	(349)	(203)
Travel Agency	52.8%	51.1%	42.0%	38.1%	72.3%	41.8%	54.7%	56.8%	58.9%	44.4%	62.9%	50.5%
Personal Computer	31.9	33.6	38.4	38.2	30.4	27.0	32.3	24.8	34.1	19.9	15.3	11.2
Airlines Directly	17.6	14.1	19.1	28.9	16.0	24.1	15.1	17.1	11.7	26.5	10.1	31.7
Friends/Relatives	17.4	16.0	14.9	22.2	20.0	20.5	10.5	18.1	15.4	11.2	19.0	15.3
Corporate Travel Dept.	11.1	17.9	4.0	13.9	6.7	7.4	17.6	10.1	15.8	19.6	17.4	2.4
Travel Guides	10.8	14.5	13.2	23.1	8.3	2.5	11.5	7.6	6.8	4.2	3.1	3.5
Tour Company	7.5	11.9	14.7	5.7	4.1	6.5	2.8	6.0	7.2	4.0	1.7	0.4
Government Sources	6.6	3.2	2.5	25.1	5.3	19.8	4.5	2.3	5.0	9.6	3.8	3.1
Newspapers/Magazines	3.7	4.2	4.6	4.1	4.4	1.3	1.5	5.2	3.1	3.3	2.3	-
In-flight Info. Systems	1.1	1.1	0.3	2.7	0.2	5.4	-	1.2	0.4	5.2	-	0.4
TV/Radio	1.1	0.8	1.1	1.8	0.7	2.2	-	1.3	1.1	0.2	0.3	-

\*Column percentages may total more than 100 percent due to multiple responses.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 11

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- More than seven in ten (72%) overseas visitors to California used an economy/tourist ticket, while 17 percent used a business class ticket. South American (4%), India (4%), and Mexican (3%) travelers reported the highest use of first class tickets.
- Fifteen percent (15%) of overseas travelers to California traveled with an inclusive tour package, where airfare, lodging, ground transportation, or other items were prepaid prior to departure. Visitors from the U.K. (26%) and China (17%) took the greatest advantage of inclusive tour packages. On the other hand, fewer visitors from India (4%) used tour packages.

TYPE OF AIRLINE TICKET*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,336)	(1,884)	(849)	(246)	(1,087)	(169)	(168)	(1,043)	(228)	(161)	(339)	(191)
Economy/Tourist/Coach	71.9%	57.1%	72.3%	72.7%	73.8%	65.8%	84.0%	66.9%	83.5%	75.7%	72.5%	75.1%
Executive/Business	16.7	26.5	15.1	22.1	13.2	11.4	11.0	19.6	10.8	16.6	17.5	5.9
Frequent Flyer Award	4.1	2.6	3.9	2.7	5.7	10.0	3.9	2.2	2.7	5.1	3.6	2.5
Discount/Group Fare	3.7	7.7	2.7	0.4	3.2	7.3	0.4	4.3	5.7	2.4	0.8	0.5
Frequent Flyer Upgrade	3.1	4.9	2.5	2.6	5.7	0.7	-	4.8	3.2	2.1	3.1	5.3
First Class	1.9	2.8	2.1	2.8	1.9	4.0	-	1.9	-	0.2	3.7	3.4
Non-Revenue	1.1	1.1	2.1	2.1	1.0	1.6	0.2	0.1	0.3	-	0.3	3.0
Don't Know	2.6	4.9	2.6	1.7	1.5	2.6	1.4	4.1	0.8	1.5	0.9	6.6
<b>USE OF PREPAID PACKAGE</b>												
(Number of Respondents)	(7,489)	(1,921)	(869)	(250)	(1,109)	(181)	(174)	(1,057)	(230)	(159)	(339)	(199)
<b>YES**</b>	<b>15.3%</b>	<b>15.3%</b>	<b>26.3%</b>	<b>10.4%</b>	<b>18.5%</b>	<b>11.1%</b>	<b>13.8%</b>	<b>15.8%</b>	<b>13.1%</b>	<b>17.2%</b>	<b>4.1%</b>	<b>11.1%</b>
Air/Lodging	10.7	12.6	17.9	7.3	12.2	9.4	11.2	11.0	10.8	11.2	1.7	7.0
Guided Tour	7.6	9.8	9.9	7.1	9.6	8.5	6.0	9.1	10.5	7.1	0.7	1.4
Air/Rent Car	3.7	0.5	5.3	2.0	3.5	3.7	7.5	6.6	2.4	10.8	1.7	0.9
Air/Lodging/Tour	5.0	7.6	4.5	6.2	6.2	7.9	4.1	6.5	8.4	3.7	-	-
Air/Lodging/Rent Car	2.7	0.4	3.9	0.6	2.1	2.7	7.1	5.2	1.6	6.7	1.1	0.9
Air/Lodging/Bus	4.1	5.0	4.6	5.6	6.0	2.7	2.1	5.4	7.8	2.5	0.5	-
Air/Lodging/Bus/Tour	3.1	3.9	2.4	5.6	4.0	2.1	2.1	5.0	7.0	1.7	-	-
Cruise	1.4	0.7	1.2	-	3.4	2.1	0.4	3.8	2.7	2.4	0.7	-
<b>NO</b>	<b>84.7%</b>	<b>84.7%</b>	<b>73.7%</b>	<b>89.6%</b>	<b>81.5%</b>	<b>88.9%</b>	<b>86.2%</b>	<b>84.2%</b>	<b>86.9%</b>	<b>82.8%</b>	<b>95.9%</b>	<b>88.9%</b>
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

\*Column percentages may not total 100 percent due to multiple response.

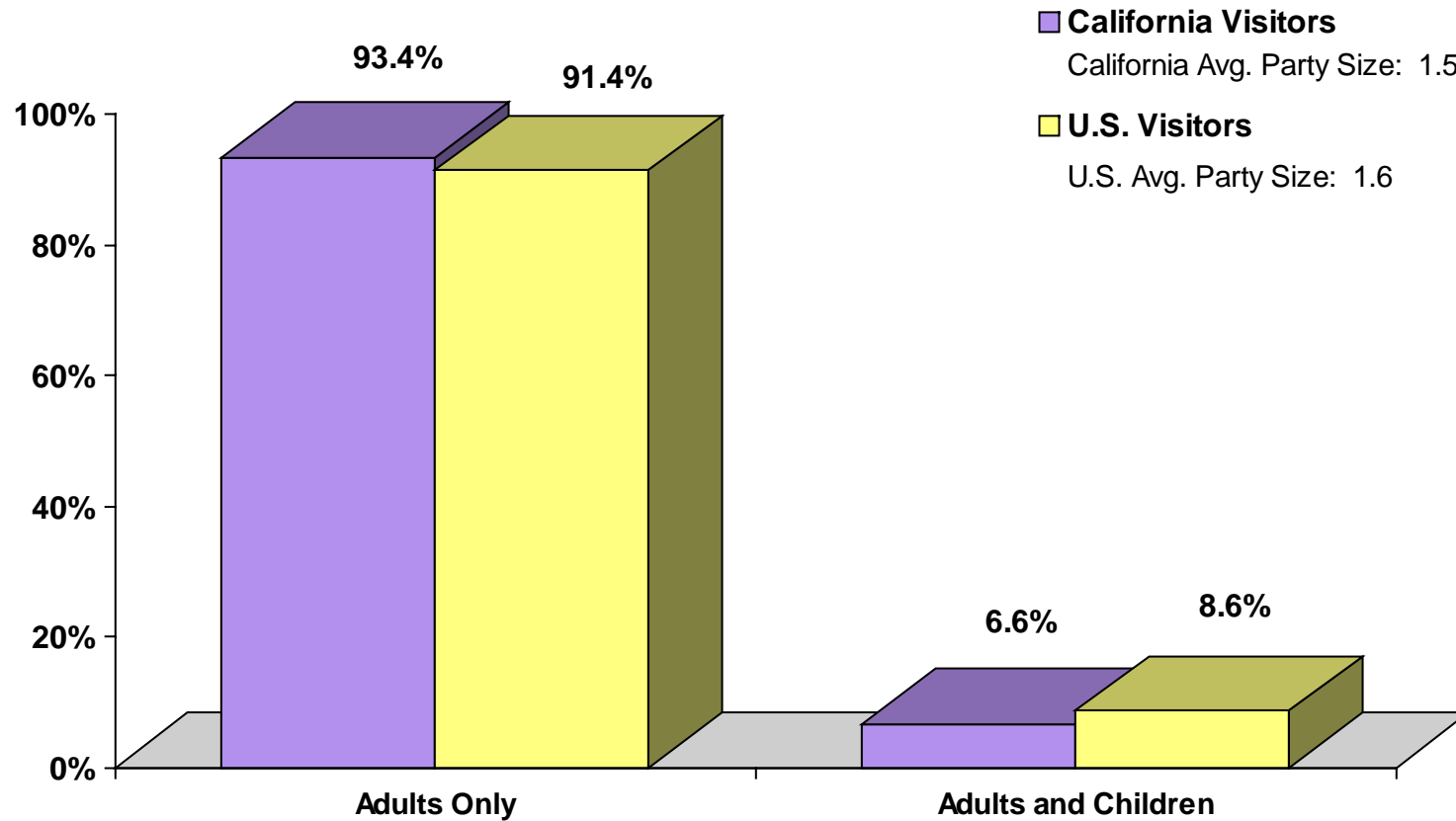
\*\*Multiple response. Includes all package combinations. Each category not mutually exclusive.

\*\*\*Caution - small sample size.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.

CIC Research, Inc.

**Figure 9**  
**TRAVEL PARTY SIZE**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 12

**TRAVEL PARTY SIZE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

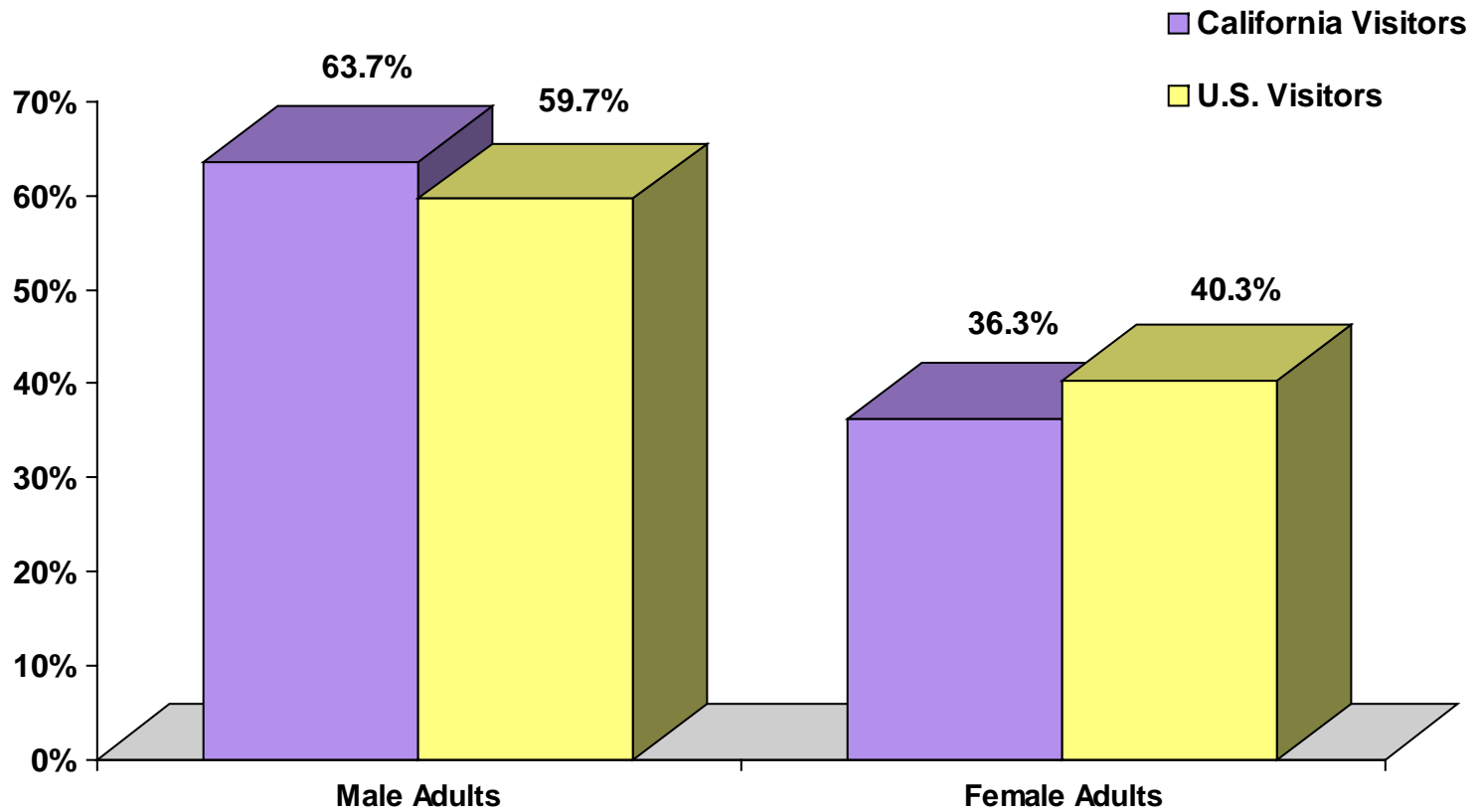
- The mean total party size for all overseas travelers was 1.5 persons. Overall, 93 percent of overseas travel parties were adults only and seven percent were adults traveling with children. The greatest proportion of visitors who reported traveling with children, were from Mexico (13%), followed by China (12%) and Australia/New Zealand (10%).

TRAVEL PARTY SIZE	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,625)	(1,959)	(877)	(251)	(1,120)	(193)	(174)	(1,084)	(236)	(172)	(353)	(202)
Adults Only	93.4%	94.3%	92.9%	95.9%	90.2%	94.6%	92.5%	91.5%	92.6%	87.8%	96.7%	86.9%
Adults and Children	6.6	5.7	7.1	4.1	9.8	5.4	7.5	8.5	7.4	12.2	3.3	13.1
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Average Total Party Size	1.5	1.6	1.7	1.4	1.7	1.3	1.5	1.5	1.7	1.7	1.3	1.6
Median Total Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
<b>ADULTS ONLY</b>												
(Number of Respondents)	(6,826)	(1,806)	(783)	(237)	(983)	(178)	(143)	(956)	(202)	(155)	(331)	(170)
Average Adult Party Size	1.4	1.5	1.5	1.3	1.5	1.2	1.3	1.3	1.5	1.6	1.2	1.3
Median Adult Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
<b>ADULTS AND CHILDREN</b>												
(Number of Respondents)	(799)	(153)	(94)*	(14)*	(137)	(15)*	(31)*	(128)	(34)*	(17)*	(22)*	(32)*
Average Party Size	3.5	3.7	3.7	2.9	3.5	4.1	3.6	3.4	3.9	2.9	3.7	3.6
Median Party Size	3.0	3.0	3.0	2.0	3.0	4.0	3.0	3.0	4.0	3.0	4.0	4.0

\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Figure 10  
**GENDER OF OVERSEAS VISITORS**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 13

**SEX AND AGE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Almost two-thirds (64%) of all travelers to California were adult males, and just over one-third (36%) were adult females. The average age of traveling adult males was 43 years, versus 41 years for traveling adult females.

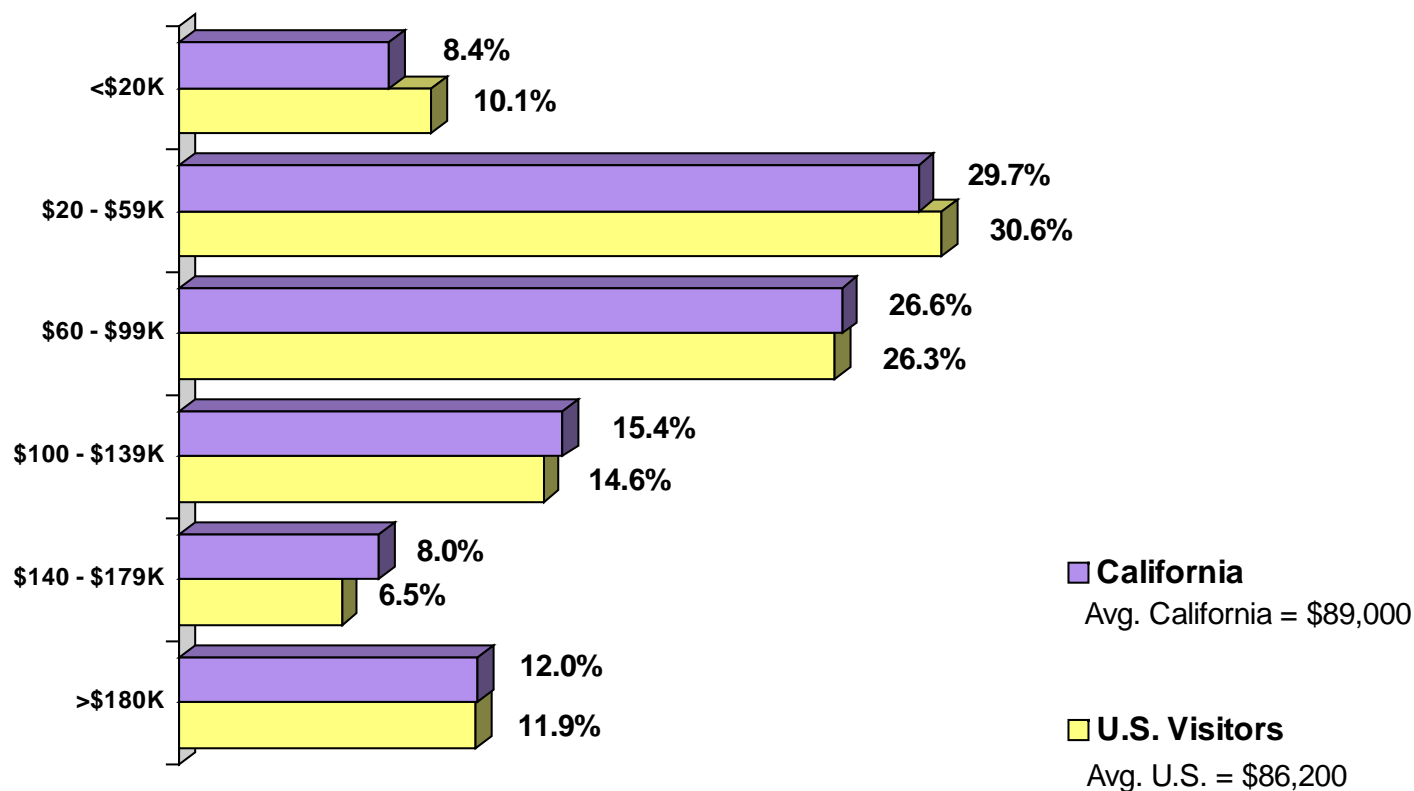
SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	4,207,000 (7,096)	630,000 (1,803)	693,000 (821)	275,000 (232)	335,000 (1,045)	181,000 (172)	215,000 (163)	177,000 (1,013)	273,000 (220)	100,000 (153)	115,000 (334)	409,000 (182)
MALE ADULTS	63.7%	67.7%	57.1%	70.0%	59.0%	50.7%	67.0%	60.2%	72.6%	72.0%	83.7%	67.0%
18-24 Years	3.0	2.3	2.6	3.3	4.1	2.8	3.3	3.5	0.9	2.0	1.6	0.6
25 - 34 Years	15.8	14.0	9.6	17.2	8.1	8.8	16.7	19.0	23.9	21.6	22.1	14.0
35 - 54 Years	32.1	38.4	29.9	37.7	31.6	26.7	32.0	30.8	36.2	43.1	34.9	43.5
55 + Years	12.7	12.9	15.0	11.8	15.2	12.4	15.0	6.9	11.8	5.3	25.1	8.9
Average Male Age	42.9	43.7	45.2	41.9	45.7	45.6	44.2	39.8	41.0	39.6	45.1	41.4
Median Male Age	41.0	43.0	43.0	41.0	46.0	43.0	44.0	39.0	37.0	39.0	45.0	37.0
FEMALE ADULTS	36.3%	32.3%	42.9%	30.0%	41.0%	49.3%	33.0%	39.8%	27.4%	28.0%	16.3%	33.0%
18-24 Years	4.1	4.2	3.3	2.9	4.4	3.0	5.0	4.0	4.4	0.3	0.6	2.6
25 - 34 Years	10.3	10.5	10.9	9.5	9.6	8.4	7.3	14.6	12.0	9.4	2.0	11.3
35 - 54 Years	14.6	12.4	15.3	13.7	19.0	23.7	13.9	19.4	8.3	16.6	8.3	13.9
55 + Years	7.2	5.2	13.4	4.0	7.8	14.2	6.9	1.8	2.7	1.6	5.6	5.2
Average Female Age	40.6	38.7	44.4	40.3	41.0	43.7	42.4	35.9	34.9	38.5	46.9	40.7
Median Female Age	39.0	37.0	43.0	40.0	40.0	40.0	45.0	35.0	33.0	37.0	45.0	36.0

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.



**Figure 11**  
**INCOME PROFILE OF OVERSEAS VISITORS**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2004)



Source: ITA "In-Flight" Survey, 2004  
 CIC Research, Inc.

Table 14

**ANNUAL HOUSEHOLD INCOME  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

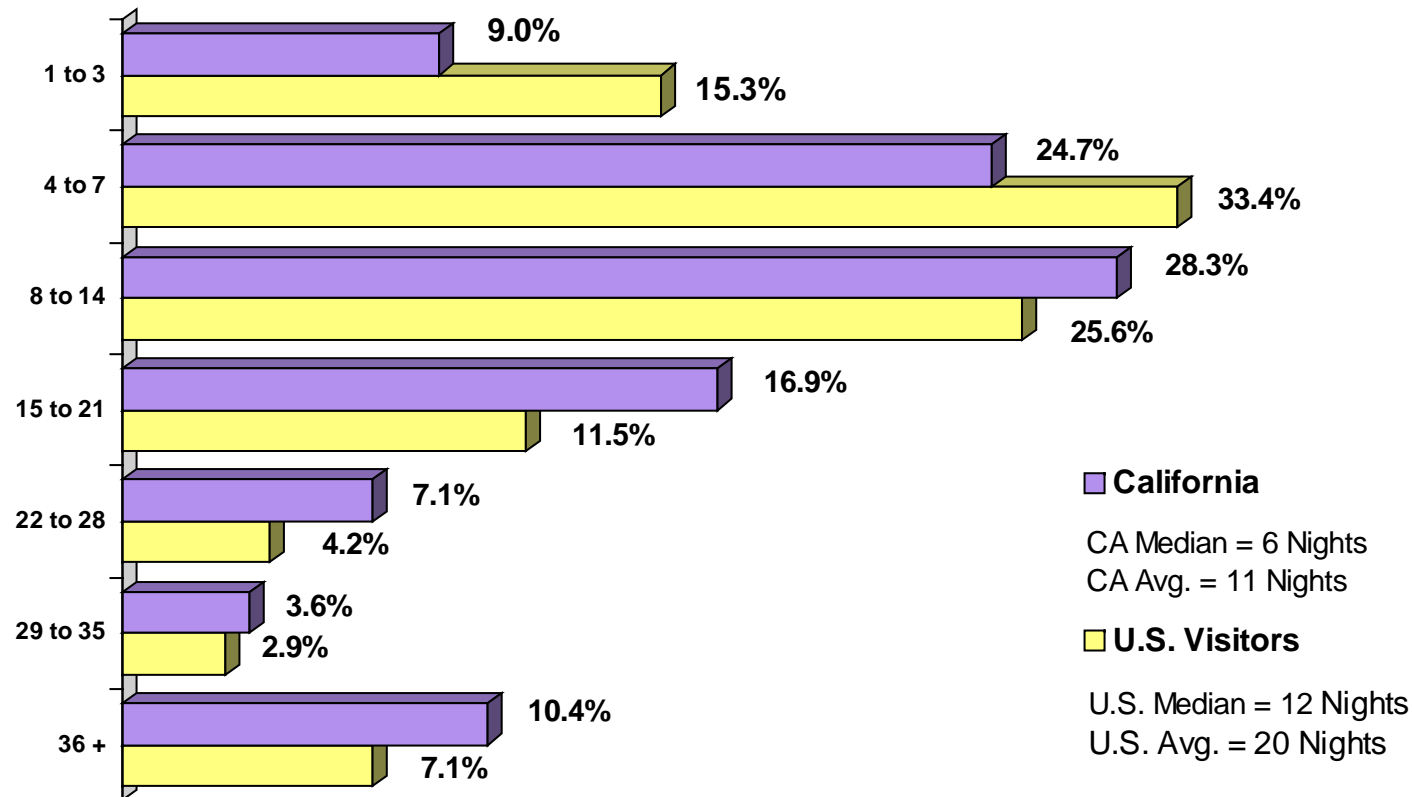
- The mean household income for overseas visitors to California was \$89,000 up from \$85,700 in 2003. During 2004, visitors from Japan (\$99,700) followed by visitors from the U.K. (\$97,400) reported the highest annual average income. Visitors from South America reported the lowest annual household income at \$64,000 (caution, small sample size).

ANNUAL HOUSEHOLD INCOME*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL				AUSTRALIA/ NEW	SOUTH			SOUTH	02-04 CHINA	03-04	MEXICO
	OVERSEAS	JAPAN	U.K.	GERMANY	ZEALAND	AMERICA	FRANCE	TAIWAN	KOREA	w/o HK	INDIA	(AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(NUMBER OF RESPONDENTS)	(6,365)	(1,536)	(727)	(202)	(994)	(146)	(126)	(945)	(204)	(147)	(317)	(166)
Under \$20,000	8.4%	4.1%	4.7%	4.7%	4.8%	22.8%	7.1%	9.2%	6.3%	31.6%	36.1%	18.1%
\$20,000 - \$59,999	29.7	24.3	25.2	28.7	34.9	34.0	26.5	44.8	48.6	29.7	25.6	29.4
\$60,000 - \$99,999	26.6	29.2	32.6	23.2	27.0	21.4	26.6	22.9	25.0	16.1	14.8	25.9
\$100,000 - \$139,999	15.4	19.0	14.2	24.1	15.3	11.8	19.8	11.1	11.6	6.7	7.7	10.0
\$140,000 - \$179,999	8.0	9.1	7.6	10.2	7.1	2.4	15.1	3.4	3.6	2.9	5.1	7.6
\$180,000 and over	12.0	14.5	15.7	9.1	10.8	7.6	4.8	8.7	4.9	12.9	10.8	8.9
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Average Annual Income	\$89,000	\$99,700	\$97,400	\$94,600	\$87,000	\$64,000	\$90,300	\$72,300	\$70,200	\$65,100	\$64,600	\$75,400
Median Annual Income	\$75,500	\$90,100	\$82,400	\$89,700	\$71,900	\$49,200	\$76,000	\$56,300	\$56,900	\$36,500	\$37,700	\$63,600

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

**Figure 12**  
**TOTAL NIGHTS IN THE U.S.**  
**OVERSEAS VISITORS TO CALIFORNIA / U.S.**  
**(2004)**



Source: ITA "In-Flight" Survey, 2004  
 CIC Research, Inc.

Table 15

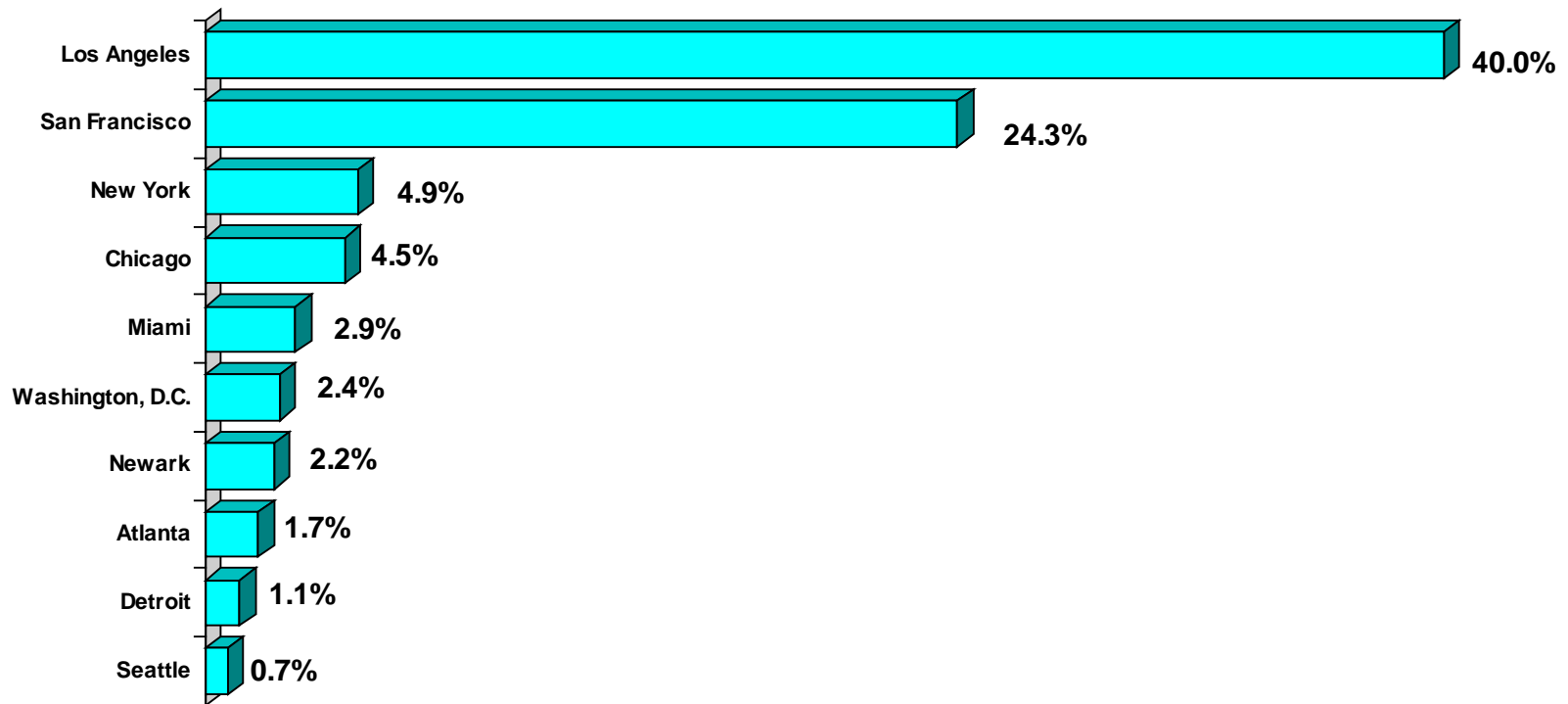
**NIGHTS AWAY FROM HOME  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Overseas visitors to California stayed an average of 20 nights in the U.S. and 11 nights in California. Nationalities varied in their average length of U.S. trip. Visitors from Japan spent the least amount of time in the U.S. (12 nights) as well as in California (8 nights), while visitors from India spent the most time in the U.S. (49 nights) and in California (23 nights).

COUNTRY OF RESIDENCE OF VISITORS												
NIGHTS IN U.S.	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,624)	(1,963)	(874)	(254)	(1,121)	(185)	(172)	(1,084)	(237)	(171)	(349)	(202)
Average No. Nights	20.4	11.6	15.3	22.8	20.1	20.9	19.7	18.0	29.0	21.3	49.0	13.0
Median No. Nights	12.0	6.0	14.0	14.0	15.0	14.0	14.0	9.0	9.0	10.0	26.0	7.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(6,812)	(1,825)	(810)	(227)	(1,051)	(156)	(151)	(905)	(204)	(139)	(278)	(157)
Average Nts. in Dest.	11.1	8.2	7.9	13.1	8.5	11.5	10.3	11.8	18.2	13.9	22.8	9.3
Median Nts. in Dest.	6.0	4.0	6.0	6.0	5.0	5.0	6.0	6.0	6.0	6.0	9.0	5.0

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

**Figure 13**  
**PORT OF ENTRY OF OVERSEAS VISITORS**  
OVERSEAS VISITORS TO CALIFORNIA  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 16

**PORT OF ENTRY  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

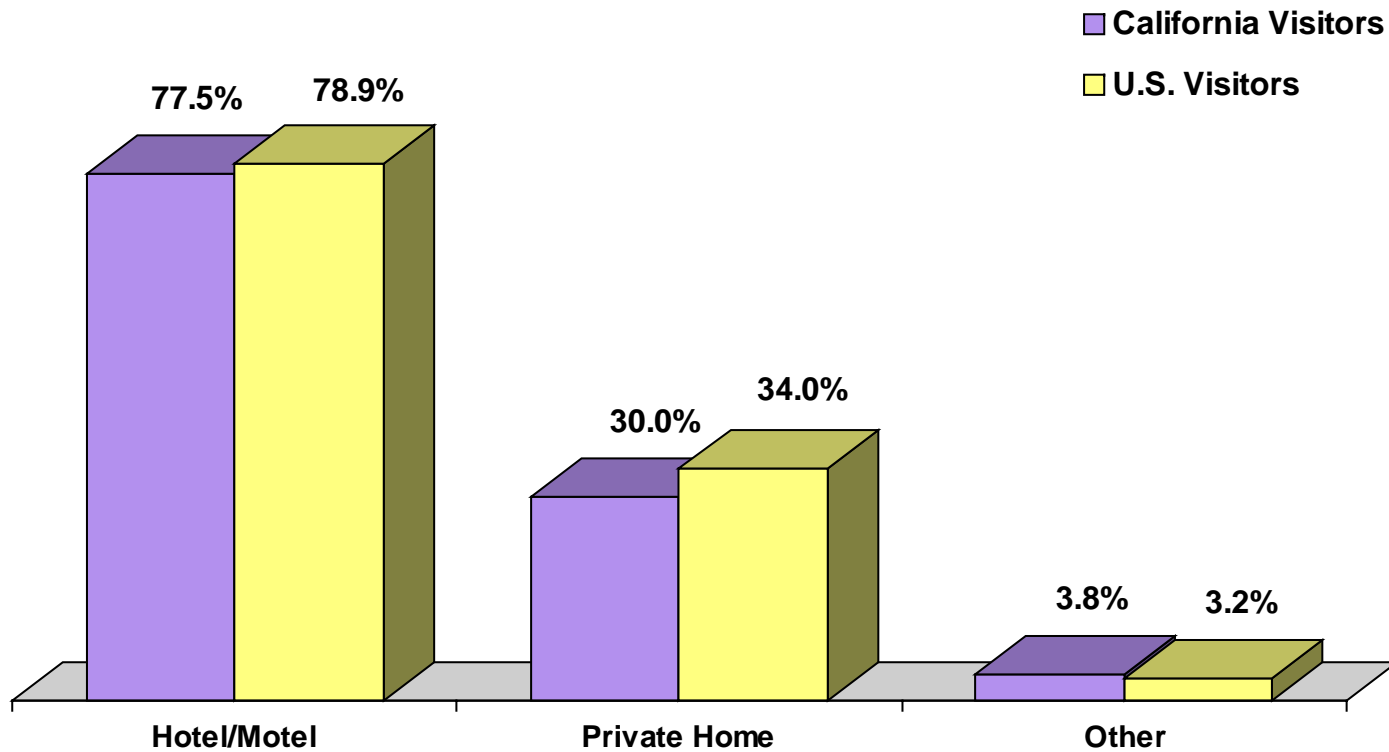
- A high ratio of California ports of entry is expected for overseas visitors to the State. Consistent with results in previous years, approximately six in ten (64%) of California visitors reported U.S. entry either through Los Angeles (40%) or San Francisco (24%).

PORT OF ENTRY*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,664)	(1,966)	(877)	(254)	(1,122)	(196)	(175)	(1,089)	(238)	(177)	(353)	(204)
Atlanta, GA	1.7%	-	1.2%	6.2%	0.1%	7.3%	1.3%	-	1.5%	-	0.8%	-
Boston, MA	0.3	-	0.1	0.2	0.1	-	-	-	-	-	0.5	-
Chicago, IL	4.5	2.2	7.0	8.5	1.0	2.4	4.6	0.4	1.3	4.0	6.5	-
Dallas/Ft. Worth, TX	0.9	0.7	0.4	1.4	-	7.3	2.4	-	-	-	-	1.8
Detroit, MI	1.1	3.6	0.1	1.9	0.1	-	-	1.8	-	-	0.5	-
Honolulu, HI	1.3	2.0	0.2	-	5.9	-	-	0.7	4.1	2.2	-	-
Houston, TX	0.6	0.3	0.6	0.3	0.1	3.8	2.6	-	-	-	-	2.4
Los Angeles, CA	40.0	51.1	35.3	29.6	70.2	11.5	31.1	53.3	51.5	29.5	23.6	63.4
Miami, FL	2.9	0.2	1.7	-	0.8	49.7	0.4	-	-	-	0.5	-
Minn./St. Paul, MN	0.5	1.2	1.3	-	-	-	0.7	-	-	0.2	0.3	-
New York, NY	4.9	1.6	4.4	3.7	3.1	5.2	5.3	1.5	0.5	2.2	8.7	-
Newark, NJ	2.2	0.3	2.3	1.3	0.3	1.9	4.8	0.3	-	-	4.8	-
Orlando, FL	0.1	-	0.7	-	0.1	-	-	-	-	-	-	2.2
Philadelphia, PA	0.2	-	-	-	-	-	1.6	-	-	-	0.4	-
Portland, OR	0.1	0.2	-	0.7	-	-	-	-	-	-	-	-
San Francisco, CA	24.3	31.3	26.5	28.5	11.7	0.4	29.0	30.9	28.4	34.6	32.7	15.7
Seattle, WA	0.7	1.7	0.5	-	-	-	-	1.4	1.0	0.5	0.3	-
Washington, DC	2.4	0.5	3.3	5.0	0.8	2.1	3.1	-	-	0.1	3.3	-
Other	11.3	3.2	14.4	12.8	5.6	8.2	13.1	9.7	11.7	26.6	17.2	14.5
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Figure 14  
**OVERSEAS VISITORS' ACCOMMODATIONS**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 17

**ACCOMMODATIONS  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Seventy-eight percent (78%) of California visitors chose to stay in a hotel/motel during their stay this year, compared to 73 percent in 2003. Visitors from Japan, the U.K., Australia/New Zealand, and Germany reported over 80 percent of hotel usage. Visitors from India made the highest use of private homes (57%).

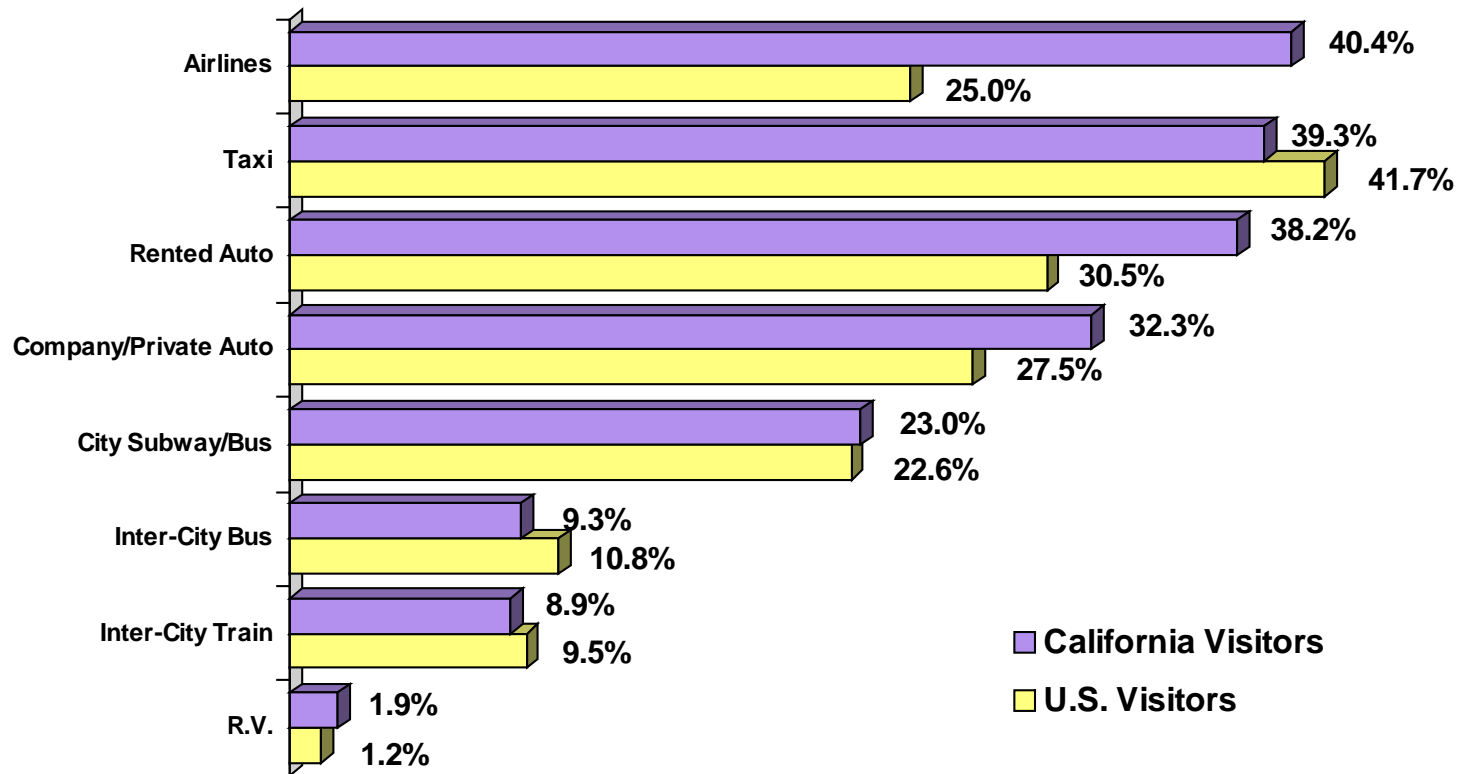
TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	4,207,000 (6,481)	630,000 (1,723)	693,000 (791)	275,000 (213)	335,000 (1,015)	181,000 (147)	215,000 (141)	177,000 (838)	273,000 (195)	100,000 (127)	115,000 (271)	409,000 (153)
<b>Hotel / Motel</b>	<b>77.5%</b>	<b>83.8%</b>	<b>83.7%</b>	<b>80.8%</b>	<b>83.1%</b>	<b>69.7%</b>	<b>82.8%</b>	<b>59.1%</b>	<b>73.7%</b>	<b>73.9%</b>	<b>50.7%</b>	<b>62.5%</b>
Average Nights in Dest.	6.1	4.7	6.0	6.1	5.6	6.3	5.5	6.7	6.0	7.1	11.4	4.1
Median Nights in Dest.	4.0	3.0	5.0	5.0	4.0	4.0	4.0	4.0	4.0	6.0	4.0	3.0
<b>Private Home</b>	<b>30.0%</b>	<b>19.9%</b>	<b>24.0%</b>	<b>33.9%</b>	<b>23.8%</b>	<b>35.8%</b>	<b>24.3%</b>	<b>47.8%</b>	<b>34.7%</b>	<b>28.2%</b>	<b>56.6%</b>	<b>48.5%</b>
Average Nights in Dest.	17.5	17.6	10.6	18.5	13.0	20.5	20.0	15.0	23.8	30.1	28.1	14.3
Median Nights in Dest.	8.0	7.0	8.5	6.0	7.0	10.0	11.0	8.0	9.0	7.0	11.0	11.0
<b>Other</b>	<b>3.8%</b>	<b>1.3%</b>	<b>2.2%</b>	<b>5.2%</b>	<b>3.3%</b>	<b>1.6%</b>	<b>5.7%</b>	<b>3.5%</b>	<b>8.3%</b>	<b>4.1%</b>	<b>4.0%</b>	<b>0.5%</b>

\*Column percentages may not total to 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.



**Figure 15**  
**TRANSPORTATION WITHIN THE U.S.**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2004)



Source: ITA "In-Flight" Survey, 2004  
 CIC Research, Inc.

Table 18

**TRANSPORTATION IN THE U.S.  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

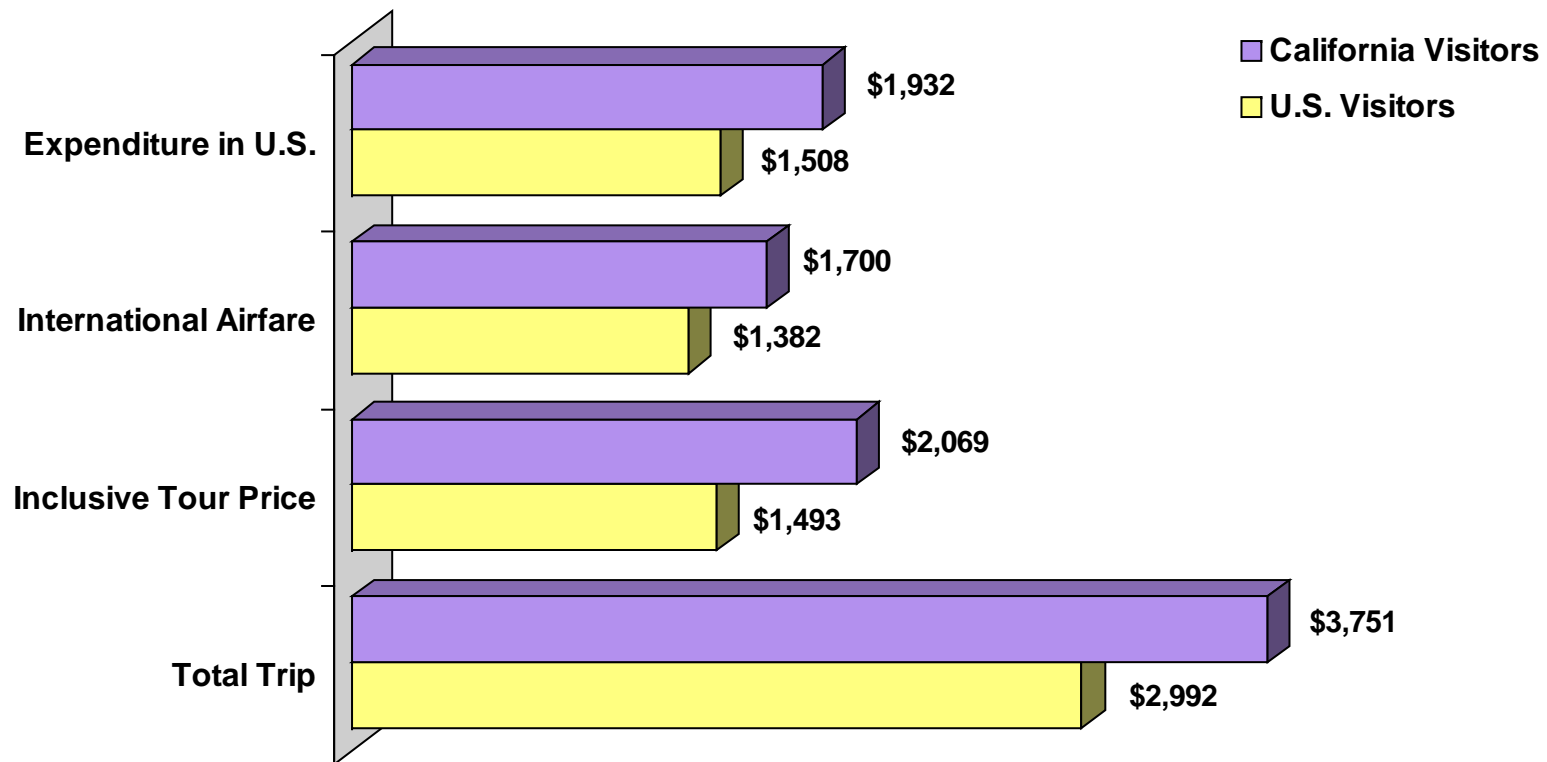
- Transportation in the U.S. used by visitors to California was predominantly airlines (40%), taxi/cab/limousine (39%), rented autos (38%), or company/private auto (32%).
- Visitors to California from Australia/New Zealand were most likely to use airlines (53%) and taxi/cab/limousines (49%). Visitors from Germany (53%) were most likely to rent an auto, while visitors from Mexico (46%), South Korea (45%), and Taiwan (44%) were most likely to use a company or private auto.

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
(Number of Respondents)	(7,053)	(1,855)	(808)	(237)	(1,028)	(157)	(158)	(1,014)	(219)	(153)	(313)	(176)
Airlines in U.S.	40.4%	36.2%	35.6%	34.6%	53.4%	54.0%	32.5%	37.3%	33.7%	45.7%	47.6%	24.0%
Taxi/Cab/Limousine	39.3	42.8	46.1	23.3	48.6	36.0	31.7	28.8	22.7	27.9	49.8	30.1
Rented Auto	38.2	32.7	35.5	53.0	36.8	29.9	52.9	36.8	46.1	33.2	25.7	21.3
Company or Private Auto	32.3	37.4	25.0	22.0	29.2	27.9	25.7	44.1	44.5	39.6	24.0	46.2
City Subway/Tram/Bus	23.0	21.8	25.9	24.9	33.5	19.7	26.9	20.7	15.7	14.5	20.4	12.9
Bus between Cities	9.3	6.5	13.4	3.3	15.4	12.5	3.9	10.9	6.8	11.4	9.0	13.2
Railroad between Cities	8.9	6.9	7.8	16.3	11.4	4.0	13.7	6.6	6.5	6.9	16.2	12.6
Motor Home/Camper	1.9	0.8	1.3	2.2	1.3	0.8	-	0.9	1.9	5.2	5.6	-

\*Column percentages may not total to 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Figure 16  
**TRIP EXPENDITURES**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2004)



Source: ITA "In-Flight" Survey, 2004  
CIC Research, Inc.

Table 19

**EXPENDITURES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2004)**

- Overseas visitors to California reported spending approximately \$3,751 per capita on their entire trip away from home, up five percent from \$3,569 in 2003. Visitors from India recorded the highest total trip spending (\$4,843), followed by Australia/New Zealand visitors (\$4,321) and Germany (\$3,964).

COUNTRY OF RESIDENCE OF VISITORS												
AVERAGE PER VISITOR TRIP	TOTAL	AUSTRALIA/ NEW ZEALAND								02-04 CHINA w/o HK	03-04 INDIA	MEXICO (AIR)
EXPENDITURES	OVERSEAS	JAPAN	U.K.	GERMANY	AMERICA	FRANCE	TAIWAN	SOUTH KOREA				
ESTIMATED TRAVELERS	4,207,000	630,000	693,000	275,000	335,000	181,000	215,000	177,000	273,000	100,000	115,000	409,000
TOTAL TRIP	\$3,751	\$3,720	\$3,311	\$3,964	\$4,321	\$3,057	\$3,538	\$3,118	\$3,231	\$3,254	\$4,843	\$2,227
(Number of Respondents)	(4,091)	(990)	(484)	(155)	(717)	(84)	(85)	(509)	(112)	(70)	(182)	(111)
INCLUSIVE TOUR PRICE	\$2,069	\$1,528	\$2,039	\$2,320	\$3,087	\$3,134	\$1,774	\$1,473	\$910	\$1,494	\$2,814	\$1,528
(Number of Respondents)	(927)	(229)	(200)	(20)**	(169)	(11)**	(22)**	(115)	(29)**	(16)**	(81)**	(11)**
INTERNATIONAL AIRFARE	\$1,700	\$1,965	\$1,589	\$1,713	\$2,334	\$1,122	\$1,694	\$1,284	\$1,260	\$1,180	\$2,002	\$835
(Number of Respondents)	(4,792)	(1,058)	(491)	(185)	(856)	(113)	(101)	(663)	(139)	(108)	(244)	(137)
EXPENDITURE IN U.S.*	\$1,932	\$1,693	\$1,628	\$2,114	\$1,952	\$1,794	\$1,699	\$1,836	\$1,762	\$1,963	\$2,799	\$1,264
(Per Day)	\$95	\$146	\$107	\$93	\$97	\$86	\$86	\$102	\$61	\$92	\$57	\$98
(Number of Respondents)	(5,122)	(1,284)	(606)	(180)	(815)	(112)	(108)	(687)	(144)	(96)**	(236)	(134)
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(Number of Respondents)	(5,122)	(1,284)	(606)	(180)	(815)	(112)	(108)	(687)	(144)	(96)**	(236)	(134)
TRANSPORT IN U.S.	\$325	\$293	\$222	\$392	\$267	\$310	\$178	\$322	\$278	\$319	\$623	\$226
LODGING IN U.S.	\$575	\$522	\$509	\$751	\$526	\$501	\$580	\$417	\$648	\$486	\$866	\$196
FOOD, BEVERAGES	\$373	\$293	\$370	\$451	\$409	\$326	\$376	\$346	\$259	\$304	\$484	\$221
GIFTS, SOUVENIRS	\$337	\$312	\$240	\$238	\$356	\$325	\$198	\$456	\$324	\$451	\$403	\$352
ENTERTAINMENT	\$177	\$118	\$208	\$171	\$245	\$168	\$100	\$187	\$120	\$175	\$206	\$134
OTHER	\$113	\$103	\$56	\$88	\$127	\$137	\$252	\$75	\$81	\$191	\$202	\$76
AVERAGE NIGHTS IN U.S.	20.4	11.6	15.3	22.8	20.1	20.9	19.7	18.0	29.0	21.3	49.0	13.0
AVERAGE NIGHTS IN CALIF.	11.1	8.2	7.9	13.1	8.5	11.5	10.3	11.8	18.2	13.9	22.8	9.3
MEDIAN NIGHTS IN CALIFORNIA	6.0	4.0	6.0	6.0	5.0	5.0	6.0	6.0	6.0	6.0	9.0	5.0

\*Overseas visitors on exclusive tour packages were excluded.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 20

**EXPENDITURES**  
**OVERSEAS AND MEXICAN VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS\***  
**(2004)**

- Visitors who only visited California during their U.S. trip reported spending \$3,209 per capita on their entire trip away from home, up slightly from \$3,044 per visitor in 2003. Half (50%) of their total trip expenditures were in California (\$1,611).
- Average daily California expenses for California-only visitors were \$88 per day, up from \$86 per day in 2003. Average daily expenditures in the U.S. for all overseas visitors to California was \$93.

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$3,209
(NUMBER OF RESPONDENTS)	(1,821)
INCLUSIVE TOUR PRICE	\$2,100
(NUMBER OF RESPONDENTS)	(238)
INTERNATIONAL AIRFARE	\$1,598
(NUMBER OF RESPONDENTS)	(2,192)
EXPENDITURE IN CALIFORNIA	\$1,544
PER DAY	\$88
(NUMBER OF RESPONDENTS)	(2,376)
<u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(2,376)
TRANSPORT IN U.S.	\$219
LODGING	\$483
FOOD, BEVERAGES	\$303
GIFTS, SOUVENIRS	\$278
ENTERTAINMENT	\$134
OTHER	\$95
<u>AVERAGE NIGHTS IN CALIFORNIA</u>	13.7

\*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.



**OVERSEAS AND MEXICAN LEISURE VISITORS  
TO CALIFORNIA<sup>2</sup>  
(2004)**

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<sup>2</sup> Leisure visitors were defined as those visitors whose main purpose of trip was vacation/holidays or visiting friends and relatives.

**Table 21**  
**RESIDENCE OF OVERSEAS AND MEXICAN LEISURE VISITORS TO THE UNITED STATES AND CALIFORNIA**  
**(2004)**

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	Percent Of All Leisure Visitors To The U.S.	Estimated Leisure Visitors To California	Percent Of All Leisure Visitors To California	California Share Of Visitors From This Country
<b>EUROPE</b>	<b>7,003,000</b>	<b>46.2%</b>	<b>1,218,000</b>	<b>49.9%</b>	<b>17.4%</b>
W. EUROPE	6,758,000	44.6%	1,203,000	49.3%	17.8%
Austria	63,000	0.4%	7,000	0.3%	11.2%
Belgium	117,000	0.8%	36,000	1.5%	30.6%
Denmark	87,000	0.6%	9,000	0.4%	10.7%
France	481,000	3.2%	130,000	5.3%	27.0%
Germany	802,000	5.3%	176,000	7.2%	22.0%
Ireland	279,000	1.8%	29,000	1.2%	10.4%
Italy	285,000	1.9%	75,000	3.1%	26.4%
Netherlands	245,000	1.6%	79,000	3.2%	32.3%
Norway	78,000	0.5%	7,000	0.3%	8.9%
Spain	258,000	1.7%	24,000	1.0%	9.4%
Sweden	167,000	1.1%	28,000	1.1%	17.1%
Switzerland	154,000	1.0%	27,000	1.1%	17.6%
United Kingdom	3,530,000	23.3%	565,000	23.1%	16.0%
Other Western Europe	212,000	1.4%	11,000	0.5%	5.3%
E. EUROPE	226,000	1.5%	16,000	0.7%	6.9%
<b>CARIBBEAN</b>	<b>689,000</b>	<b>4.5%</b>	<b>1,000</b>	<b>0.0%</b>	<b>0.2%</b>
Jamaica	89,000	0.6%	1,000	0.0%	1.1%
Trinidad & Tobago	104,000	0.7%	1,000	0.0%	0.6%

Table 21 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	Percent Of All Leisure Visitors To The U.S.	Estimated Leisure Visitors To California	Percent Of All Leisure Visitors To California	California Share Of Visitors From This Country
<b>SOUTH AMERICA</b>	<b>1,074,000</b>	<b>7.1%</b>	<b>110,000</b>	<b>4.5%</b>	<b>10.2%</b>
Argentina	103,000	0.7%	13,000	0.5%	12.7%
Brazil	216,000	1.4%	50,000	2.0%	23.2%
Chile	42,000	0.3%	2,000	0.1%	3.9%
Colombia	226,000	1.5%	16,000	0.7%	7.2%
Ecuador	87,000	0.6%	7,000	0.3%	7.5%
Peru	118,000	0.8%	12,000	0.5%	9.8%
Venezuela	241,000	1.6%	9,000	0.4%	3.6%
Other South America	41,000	0.2%	1,000	0.0%	3.2%
<b>CENTRAL AMERICA (Excl'd. Mexico)</b>	<b>413,000</b>	<b>2.7%</b>	<b>42,000</b>	<b>1.7%</b>	<b>10.2%</b>
Costa Rica	89,000	0.6%	6,000	0.2%	7.2%
Guatemala	62,000	0.4%	15,000	0.6%	23.6%
Honduras	48,000	0.3%	1,000	0.0%	2.9%
Other Central America	214,000	1.4%	20,000	0.8%	9.3%
Mexico (Air Travelers Only)	1,025,000	N.A.	305,000	N.A.	29.8%
<b>AFRICA</b>	<b>129,000</b>	<b>0.8%</b>	<b>6,000</b>	<b>0.2%</b>	<b>5.0%</b>
South Africa, Rep. of	34,000	0.2%	6,000	0.2%	17.7%
<b>OCEANIA</b>	<b>475,000</b>	<b>3.1%</b>	<b>243,000</b>	<b>10.0%</b>	<b>51.2%</b>
Australia	374,000	2.5%	190,000	7.8%	50.9%
New Zealand	84,000	0.6%	50,000	2.0%	60.2%
Other Oceania	17,000	0.0%	3,000	12.8%	15.3%



Table 21 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Estimated Leisure Visitors To The U.S.	Percent Of All Leisure Visitors To The U.S.	Estimated Leisure Visitors To California	Percent Of All Leisure Visitors To California	California Share Of Visitors From This Country
<b>FAR EAST</b>	<b>5,007,000</b>	<b>33.0%</b>	<b>776,000</b>	<b>31.8%</b>	<b>15.5%</b>
Hong Kong	54,000	0.4%	31,000	1.3%	58.8%
India	114,000	0.8%	46,000	1.9%	40.1%
Indonesia	30,000	0.2%	17,000	0.7%	56.3%
Japan	2,973,000	19.6%	312,000	12.8%	10.5%
Korea, South	302,000	2.0%	106,000	4.3%	35.1%
People's Republic of China	64,000	0.4%	28,000	1.1%	43.4%
Philippines	102,000	0.7%	81,000	3.3%	79.4%
Republic of China*	149,000	1.0%	88,000	3.6%	59.4%
Singapore	44,000	0.3%	28,000	1.1%	63.7%
Thailand	37,000	0.2%	23,000	0.9%	63.3%
Other Far East	1,138,000	7.4%	16,000	0.7%	1.1%
<b>MIDDLE EAST</b>	<b>392,000</b>	<b>2.6%</b>	<b>38,000</b>	<b>1.6%</b>	<b>9.8%</b>
Israel	152,000	1.0%	17,000	0.7%	10.9%
Saudi Arabia	9,000	0.1%	3,000	0.1%	36.4%
Turkey	45,000	0.3%	8,000	0.3%	17.1%
Other Middle East	186,000	1.2%	10,000	0.4%	6.2%
<b>Total Overseas Leisure Visitors</b> (Number of Respondents)	<b>15,163,000</b> (17,871)	<b>100.0%</b>	<b>2,441,000</b> (4,056)	<b>100.0%</b>	<b>16.1%</b>

\* Countries and World Region visitor volumes are independantly estimated and may not sum to total visitors.

Source: ITA Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 22

**MAIN DESTINATION BY STATE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- California was the main U.S. state destination for almost three-quarters (71%) of overseas leisure travelers to California in 2004, similar to the proportion from previous years. The highest proportion of leisure travelers, whose main destination was California, were from Mexico (91%), followed by Taiwan (85%) and South Korea (85% – caution small sample size). Australia/New Zealand (41%) reported the lowest proportion of leisure travelers with California as their main destination.

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(2,940)	(739)	(529)	(112)	(475)	(78)**	(77)**	(302)	(78)**	(41)**	(101)	(118)
<b>California</b>	<b>70.5%</b>	<b>84.1%</b>	<b>62.8%</b>	<b>74.6%</b>	<b>40.8%</b>	<b>55.0%</b>	<b>74.8%</b>	<b>84.1%</b>	<b>84.7%</b>	<b>52.0%</b>	<b>73.9%</b>	<b>91.3%</b>
Hawaiian Islands	6.8	3.7	12.4	13.7	5.1	13.7	2.9	0.7	-	12.3	-	-
Nevada	3.8	5.0	6.5	2.2	1.4	4.8	1.2	1.8	6.8	-	0.5	0.5
New York	2.7	1.5	1.3	2.8	9.5	1.7	0.7	0.1	-	-	10.8	-
Florida	2.1	0.4	2.3	0.7	1.0	15.0	-	0.6	-	5.0	0.6	0.4
Arizona	1.1	0.6	2.9	-	0.8	-	-	0.2	-	-	0.5	-

\*Visitors may report only one destination -- States with less than 1% response were not listed.

\*\*Caution-Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 23

**PURPOSE OF TRIP  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- More than 81% of overseas leisure travelers to California reported they were on vacation/holiday, while 52 percent reported visiting friends or relatives. This is similar to results from previous years. Leisure travelers from U.K. (89%), Australia/New Zealand (87%), and France (82%) recorded the highest proportion of travelers on vacation/holiday in 2004.
- A large proportion of visitors from India (87%) reported coming to California to visit friends and relatives, while only 36 percent of British travelers reported their purpose was to visit friends and relatives.

PURPOSE OF TRIP*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL				AUSTRALIA/ NEW	SOUTH			SOUTH	CHINA		MEXICO
	OVERSEAS	JAPAN	U.K.	GERMANY	ZEALAND	AMERICA	FRANCE	TAIWAN	KOREA	w/o HK	INDIA	(AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(4,056)	(947)	(689)	(151)	(730)	(101)	(106)	(443)	(108)	(54)**	(141)	(124)
Vacation/ Holidays	81.2%	84.5%	89.3%	80.1%	87.0%	57.4%	82.3%	72.7%	81.3%	73.2%	56.7%	73.9%
Visit Friends/Relatives	51.8	45.3	35.6	38.6	52.2	72.4	42.7	77.9	76.7	70.5	87.2	57.1
Business	4.1	1.6	2.2	2.9	5.3	3.4	5.7	4.6	4.3	11.9	6.4	1.9
Study	2.1	4.4	0.4	3.2	1.2	6.4	4.0	2.5	8.9	-	1.2	-
Attend Convention	1.7	2.8	0.3	1.5	4.3	0.3	3.7	0.6	6.7	0.3	-	0.3
Other	1.5	1.8	0.9	2.1	1.9	0.0	0.0	0.9	0.4	6.6	0.0	4.0

\*Column percentages may total more than 100 percent due to multiple responses.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 24

**LEISURE-RECREATION ACTIVITIES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Overseas leisure visitors reported a greater participation rate in almost all activities, compared with all overseas visitors to California (Table 6). Shopping, dining and sightseeing in cities were the most common leisure and recreation activities of overseas leisure visitors to California.

LEISURE/RECREATION ACTIVITIES*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(3,830)	(899)	(657)	(143)	(700)	(79)**	(100)	(417)	(98)**	(51)**	(130)	(101)
Shopping	91.9%	91.8%	93.6%	84.7%	94.5%	83.0%	90.4%	94.3%	85.9%	94.3%	80.4%	87.7%
Dining in Restaurants	87.5	86.2	93.1	88.2	89.0	71.0	82.3	75.4	74.8	83.7	71.4	67.2
Sightseeing in Cities	63.4	58.9	69.1	49.6	71.7	32.2	66.8	58.0	55.8	60.9	66.0	27.8
Visit Historical Places	51.2	16.2	61.1	63.1	60.9	36.1	61.8	33.5	31.9	43.4	55.9	34.1
Visit National Parks	46.1	28.0	50.1	67.7	38.4	35.3	66.7	35.9	53.8	38.1	42.8	21.8
Amusement/Theme Parks	45.4	39.2	39.7	37.5	54.4	42.2	36.2	48.9	48.8	34.5	46.5	46.8
Visit Small Towns	44.8	38.1	47.1	46.1	46.5	41.0	50.3	28.6	31.4	37.1	16.5	29.2
Touring Countryside	40.9	19.6	48.0	59.0	51.2	25.4	43.1	18.9	31.6	27.2	32.1	18.7
Casinos/Gambling	32.8	23.1	40.1	27.9	31.1	18.5	34.4	34.4	30.1	24.3	34.8	14.6
Guided Tours	31.1	27.6	41.4	22.7	38.6	24.4	21.1	27.5	48.5	15.9	17.2	13.3
Cultural Heritage Sites	30.6	11.4	39.1	45.5	35.5	9.2	35.9	18.4	42.8	28.8	24.2	15.7
Art Gallery/Museum	24.5	12.3	27.8	13.7	32.8	29.7	27.4	17.3	20.0	34.2	18.8	19.8
Water Sports/Sunbathing	23.4	9.3	34.0	27.3	24.0	17.0	24.8	13.5	4.6	26.1	6.2	0.5
Concert/Play/Musical	18.2	13.7	19.3	10.0	25.6	18.7	16.0	9.1	17.4	9.1	15.1	11.6
Nightclubs/Dancing	12.6	6.0	16.4	12.1	18.5	19.2	3.9	6.1	8.9	8.2	6.5	11.6
Camping/Hiking	11.1	6.3	8.1	22.2	10.1	6.2	18.8	2.1	5.9	10.8	2.9	0.7
Visit Am. Indian Comm.	9.7	3.9	12.2	12.0	8.3	1.4	14.0	2.4	3.0	4.1	18.1	0.4
Ethnic Heritage Sites	8.9	2.8	13.8	4.7	6.9	0.3	13.7	4.1	12.7	19.1	6.9	2.7
Attend Sports Event	7.7	6.3	7.9	7.2	16.1	9.3	0.5	2.3	3.7	12.4	4.7	2.8
Cruises	7.1	4.9	6.3	3.0	13.7	0.7	5.2	10.5	26.8	13.2	6.1	5.8
Golfing/Tennis	6.3	7.4	6.4	5.2	5.7	0.2	6.1	6.5	16.4	6.8	4.7	0.9
Environ./Eco. Excursions	6.2	1.2	8.6	2.3	3.3	6.1	19.6	10.8	4.1	2.1	7.8	5.4
Snow Skiing	2.8	0.2	3.4	2.2	6.0	6.9	-	3.0	0.2	13.7	2.5	0.7
Ranch Vacations	2.3	1.1	2.5	1.4	1.2	2.5	2.1	5.0	3.1	11.2	2.0	0.3
Hunting/Fishing	1.2	0.6	0.5	0.2	1.8	-	0.5	1.0	2.9	3.7	2.7	0.3

\*Multiple response. Only responses greater than 1.0 percent are detailed.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 25

**ADVANCE TRIP DECISION  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Overseas leisure visitors to California reported a median advance trip decision period of 70 days, much longer than the 50 days for all overseas visitors to California (Table 7). The median advance airline ticket reservation period for leisure visitors was 45 days.
- Leisure visitors from the U.K. reported the longest advance airline reservation time (90 days), compared to visitors from other countries.

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(3,814)	(884)	(655)	(148)	(703)	(88)**	(101)	(418)	(102)	(53)**	(123)	(114)
14 Days or Less	8.9%	10.5%	6.3%	9.2%	3.5%	10.2%	7.3%	24.7%	14.0%	9.7%	7.0%	30.6%
15 - 60 Days	40.5	59.9	24.8	24.0	26.1	55.9	30.9	64.6	64.1	59.8	57.9	52.9
61 - 120 Days	22.2	18.8	24.4	29.5	25.3	24.4	21.3	7.1	12.8	23.2	20.1	9.3
121 - 180 Days	14.0	6.5	19.4	18.1	17.2	8.0	26.4	2.8	8.3	1.4	14.9	3.8
181 Days or More	14.4	4.3	25.1	19.3	28.0	1.5	14.1	0.7	0.8	6.0	-	3.4
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Average No. of Days	105.8	67.3	143.2	128.6	154.6	64.2	119.2	40.5	53.6	60.1	67.2	43.5
Median No. of Days	70.0	50.0	120.0	100.0	120.0	50.0	90.0	30.0	30.0	30.0	50.0	30.0
<b>ADVANCE AIRLINE RESERVATIONS*</b>												
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(3,586)	(758)	(619)	(144)	(693)	(77)**	(94)**	(403)	(101)	(50)**	(115)	(111)
14 Days or less	17.5%	19.0%	11.2%	19.0%	7.8%	19.8%	7.0%	46.9%	40.0%	22.1%	25.4%	54.0%
15 - 60 Days	46.6	64.1	29.6	31.3	41.5	74.5	52.1	50.0	56.1	69.6	62.8	45.4
61 - 120 Days	18.8	11.6	24.7	26.4	33.1	5.7	21.5	2.0	3.0	-	10.2	0.7
121 - 180 Days	10.0	4.4	18.0	14.7	9.6	-	8.3	0.6	-	1.4	1.6	-
181 Days or More	7.1	0.9	16.5	8.6	8.1	-	11.1	0.5	-	-	-	-
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Mean No. of Days	72.0	44.8	111.5	83.4	88.5	30.2	80.0	23.5	24.9	28.1	33.1	18.6
Median No. of Days	45.0	30.0	90.0	60.0	70.0	30.0	60.0	15.0	20.0	25.0	25.0	10.0

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 26  
**MEANS OF BOOKING AIR TRIP AND LODGING  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Travel agents booked about 59 percent of airline ticket reservations for overseas leisure travelers to California. The proportion of travel agent air bookings ranged from a low of 43 percent for leisure travelers from the U.K., to a high of 87 percent of leisure travelers from India.
- A personal computer (i.e., Internet) was the second most common method used by leisure overseas visitors to book air trips (14%).
- Travel agents played a less significant role in booking U.S. lodging reservations (29%) than in booking airline reservations (59%).

COUNTRY OF RESIDENCE OF VISITORS												
MEANS OF BOOKING AIR TRIP*	AUSTRALIA/ NEW SOUTH ZEALAND											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)		
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(3,961)	(929)	(677)	(148)	(714)	(98)**	(101)	(427)	(107)	(52)**	(136)	(124)
Travel Agent	58.7%	56.1%	43.2%	59.0%	81.6%	62.0%	60.0%	67.5%	66.9%	46.8%	87.4%	45.4%
Personal Computer	13.5	12.9	21.4	15.4	2.5	4.3	15.5	9.9	11.3	12.6	4.9	11.2
Airline Directly	13.4	13.9	14.5	14.2	9.8	21.8	17.6	8.4	11.3	29.7	5.1	37.2
Tour Operator	8.4	9.9	15.4	3.2	2.3	7.8	3.9	9.7	0.5	6.0	-	-
Company Travel Dept.	3.3	4.1	1.9	3.7	1.0	0.1	2.3	1.5	7.3	4.3	1.5	3.3
Travel Club	0.7	0.1	1.1	1.0	0.8	-	0.4	0.4	2.7	0.3	-	-
Other/Don't Know	2.2	3.0	2.5	3.5	2.1	4.0	0.5	2.6	0.0	0.3	1.0	2.9
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>MEANS OF BOOKING LODGING***</b>												
(Number of Respondents)	(3,936)	(895)	(679)	(151)	(722)	(91)**	(103)	(438)	(104)	(53)**	(137)	(116)
<b>Yes, Booked by:</b>	<b>60.1%</b>	<b>73.3%</b>	<b>70.7%</b>	<b>63.7%</b>	<b>66.9%</b>	<b>49.0%</b>	<b>49.9%</b>	<b>36.2%</b>	<b>59.8%</b>	<b>36.3%</b>	<b>23.3%</b>	<b>46.4%</b>
Travel Agent	28.6%	36.0%	26.3%	31.0%	45.1%	15.7%	31.4%	20.1%	32.8%	22.2%	8.3%	20.3%
Hotel/Motel Directly	10.5	15.1	16.4	14.7	10.9	5.2	8.3	0.6	0.6	1.9	0.1	1.1
Tour Operator	8.7	8.6	16.2	5.8	3.8	8.9	4.9	6.1	10.2	1.6	-	0.6
Friend or Relative	6.2	9.0	4.4	4.5	4.3	10.9	2.3	4.5	13.0	2.6	8.6	7.5
Company Travel Dept.	1.8	2.7	1.7	2.3	1.5	1.3	-	1.0	-	9.7	4.7	4.8
Airline Staff	1.4	1.3	1.7	1.0	1.2	3.6	1.2	2.3	-	5.3	3.2	8.5
Business Associate	0.5	0.2	-	-	0.5	-	4.2	-	1.8	-	0.5	-
Other	9.9	6.3	13.3	12.0	11.1	7.9	4.1	3.6	4.6	4.0	3.3	3.6
<b>No</b>	<b>39.9%</b>	<b>26.7%</b>	<b>29.3%</b>	<b>36.3%</b>	<b>33.1%</b>	<b>51.0%</b>	<b>50.1%</b>	<b>63.8%</b>	<b>40.2%</b>	<b>63.7%</b>	<b>76.7%</b>	<b>53.6%</b>

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size

\*\*\* Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 27

**U.S. TRIP INFORMATION SOURCES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Travel agents were a key information source for trip information and travel planning across all countries of origin (51%), particularly for visitors from Australia/New Zealand (76%) and India (72%). Personal computer (38%) followed by friends and relatives (23%) were the next most frequently mentioned trip planning sources for leisure travelers to California. Leisure travelers from Germany reported the highest use of personal computer (48%) and from published sources (35%).

INFORMATION SOURCES*	COUNTRY OF RESIDENCE OF VISITORS												
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW		SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
					ZEALAND								
ESTIMATED TRAVELERS (Number of Respondents)	2,441,000 (4,013)	312,000 (928)	565,000 (683)	176,000 (151)	240,000 (727)	110,000 (101)	130,000 (105)	88,000 (438)	106,000 (107)	28,000 53*	46,000 (138)	305,000 (124)	
Travel Agency	50.5%	49.9%	41.0%	33.4%	75.9%	38.6%	55.1%	53.8%	59.2%	49.4%	71.5%	40.9%	
Personal Computer	37.6	40.7	40.8	48.1	33.7	24.3	44.1	33.5	40.0	23.2	16.7	13.4	
Friends/Relatives	23.1	25.9	16.9	30.8	23.7	26.6	15.1	28.5	28.2	12.9	30.5	20.1	
Airlines Directly	19.2	15.8	19.5	32.3	14.6	18.0	17.1	21.4	11.4	39.7	8.1	36.1	
Published Sources	15.4	22.6	16.1	35.3	10.3	1.0	17.1	10.6	11.3	5.0	4.5	0.3	
Tour Company	9.8	16.9	17.7	8.7	4.4	7.9	4.8	4.1	4.2	2.6	-	-	
Government Sources	8.2	4.2	2.3	31.4	5.6	27.0	5.3	3.9	3.5	9.4	5.2	3.5	
Newspapers/Magazines	5.1	6.2	5.5	6.3	5.8	0.5	0.5	8.4	3.9	3.0	4.3	-	
Corporate Travel Dept.	2.2	4.5	0.3	3.8	1.1	4.2	2.7	1.0	6.5	5.2	0.4	-	
TV/Radio Ads	1.4	0.3	1.4	3.0	0.6	0.5	-	2.7	0.7	-	0.3	-	
In-flight Info. Systems	1.4	0.9	0.4	3.7	-	9.4	-	1.4	1.1	2.6	-	0.6	

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 28

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Most of the overseas leisure travelers to California (78%) purchased a coach class ticket, particularly visitors from France (90%).
- About one-fifth (22.2%) of overseas leisure travelers to California used a prepaid package.

COUNTRY OF RESIDENCE OF VISITORS												
TYPE OF AIRLINE TICKET	AUSTRALIA/ NEW ZEALAND											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	2,441,000 (3,865)	312,000 (899)	565,000 (664)	176,000 (144)	240,000 (705)	110,000 (82)**	130,000 (101)	88,000 (428)	106,000 (105)	28,000 (49)**	46,000 (131)	305,000 (116)
Economy/Tourist/Coach	77.6%	66.1%	74.9%	82.9%	81.8%	58.6%	90.8%	70.6%	90.3%	78.3%	82.8%	74.1%
Executive/Business	10.2	16.1	11.9	9.6	7.0	13.9	1.7	12.1	4.6	7.7	7.4	5.0
Frequent Flyer Award	5.3	3.9	5.0	3.7	6.6	8.2	6.5	3.0	6.2	14.2	5.4	3.4
Discount/Group Fare	4.2	8.9	3.0	0.5	3.9	9.7	0.4	6.3	12.5	-	1.0	0.7
Frequent Flyer Upgrade	2.4	4.0	1.5	1.6	2.4	-	-	5.2	0.2	2.9	5.5	4.1
Non-revenue	1.5	2.1	2.0	3.3	1.1	0.9	0.3	-	0.9	-	-	3.0
First Class	1.2	0.9	1.6	2.7	0.5	4.6	-	1.8	-	-	2.1	2.9
Don't Know	3.0	6.4	3.3	1.9	1.4	4.9	2.0	5.6	1.7	0.3	-	6.9
USE OF PREPAID PACKAGE												
(Number of Respondents)	(3,946)	(915)	(683)	(148)	(720)	(88)**	(105)	(426)	(105)	(46)**	(133)	(121)
Yes***	22.2%	25.5%	32.7%	15.8%	21.7%	16.1%	18.6%	16.5%	29.8%	16.2%	4.7%	13.5%
Air/Lodging	15.7%	21.5%	22.2%	11.7%	14.5%	12.9%	14.3%	11.7%	24.0%	12.2%	0.6%	7.5%
Guided Tour	11.2	16.0	12.5	11.6	11.4	11.9	8.6	11.8	27.5	-	0.4	2.0
Air/Lodging/Tour	7.3	12.6	5.6	10.4	7.6	10.6	5.6	8.9	22.0	-	-	-
Air/Lodging/Bus	6.0	7.8	5.6	9.5	7.3	1.2	3.7	7.0	20.3	-	-	-
Air/Rent Car	4.5	0.4	6.6	2.0	4.1	2.4	9.2	7.7	6.3	14.4	0.3	-
Air/Lodging/Bus/Tour	4.5	5.7	2.9	9.5	4.8	-	3.7	6.7	18.3	-	-	-
Air/Lodging/Rent Car	3.3	0.3	4.9	0.4	2.4	0.5	8.4	6.5	4.2	10.4	0.3	-
Cruise	1.7	1.3	1.6	-	4.6	-	0.8	5.1	6.9	-	-	-
No	77.8	74.5	67.3	84.2	78.3	83.9	81.4	83.5	70.2	83.8	95.3	86.5
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

\*\*Caution - Small sample size

\*\*\*Multiple response. Includes all package combinations. Each category not mutually exclusive.

Source: ITA/OTTI, Survey of International Air Travelers, 2004.

CIC Research, Inc.



Table 29

**TRAVEL PARTY SIZE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Approximately nine in ten (89%) of all leisure travel groups to California consisted of adults only, while 11 percent were adults traveling with children. The mean total party size for leisure travelers was 1.7 persons. These results are very similar to those from previous years.

TRAVEL PARTY SIZE*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(4,037)	(941)	(689)	(149)	(729)	(100)	(105)	(442)	(108)	(52)**	(141)	(122)
Adults Only	89.4%	89.0%	91.1%	95.6%	86.9%	89.4%	84.0%	83.2%	86.3%	76.1%	95.3%	86.2%
Adults and Children	10.6	11.0	8.9	4.4	13.1	10.6	16.0	16.8	13.7	23.9	4.7	13.8
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Mean Total Party Size	1.7	1.9	1.9	1.5	1.8	1.5	1.9	1.6	1.8	1.8	1.4	1.6
Median Total Party Size	1.0	1.0	2.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
<b>ADULTS ONLY</b>												
(Number of Respondents)	(3,383)	(817)	(602)	(139)	(612)	(88)**	(76)**	(344)	(83)**	(41)**	(129)	(100)
Mean Adult Party Size	1.5	1.7	1.7	1.4	1.5	1.2	1.6	1.3	1.5	1.3	1.3	1.3
Median Adult Party Size	1.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
<b>ADULTS AND CHILDREN</b>												
(Number of Respondents)	(654)	(124)	(87)**	(10)**	(117)	(12)**	(29)**	(98)**	(25)**	(11)**	(12)**	(22)**
Mean Party Size	3.6	3.7	3.7	3.2	3.6	4.2	3.7	3.2	3.8	3.2	3.9	3.8
Median Party Size	3.0	3.0	3.0	3.0	4.0	5.0	4.0	3.0	4.0	3.0	4.0	4.0

\*Column percentages may total more than 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 30

**SEX AND AGE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Similar to previous years, 53 percent of overseas leisure travelers to California in 2004 were male and 47 percent female. The median age for males in 2004 was 44 years, versus 39 years for females. Overseas leisure travelers were a couple older in 2004 than the 42 years (males) and 37 years (females) reported in 2003.

SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	2,441,000 (3,725)	312,000 (853)	565,000 (642)	176,000 (136)	240,000 (676)	110,000 (82)**	130,000 (98)**	88,000 (410)	106,000 (101)	28,000 (47)**	46,000 (130)	305,000 (108)
<b>MALE ADULTS</b>	<b>52.9%</b>	<b>49.0%</b>	<b>51.5%</b>	<b>62.0%</b>	<b>51.5%</b>	<b>44.2%</b>	<b>56.2%</b>	<b>45.6%</b>	<b>61.2%</b>	<b>48.3%</b>	<b>75.6%</b>	<b>70.3%</b>
18-24 Years	3.3	2.6	3.0	2.6	4.1	2.9	1.8	4.3	1.0	4.6	1.8	0.9
25 - 34 Years	12.2	13.5	8.7	20.4	8.4	4.6	14.5	13.0	9.3	8.4	11.3	15.3
35 - 54 Years	22.9	21.1	23.7	25.3	24.3	24.5	17.7	19.8	26.2	29.1	18.8	44.6
55 + Years	14.4	11.8	16.3	13.5	14.7	12.2	22.2	8.5	24.8	6.2	43.6	9.3
<b>Average Male Age</b>	<b>44.6</b>	<b>43.3</b>	<b>46.2</b>	<b>42.2</b>	<b>45.6</b>	<b>47.6</b>	<b>48.9</b>	<b>41.4</b>	<b>48.9</b>	<b>42.0</b>	<b>52.2</b>	<b>41.0</b>
<b>Median Male Age</b>	<b>44.0</b>	<b>42.0</b>	<b>46.0</b>	<b>44.0</b>	<b>46.0</b>	<b>50.0</b>	<b>48.0</b>	<b>40.0</b>	<b>46.0</b>	<b>44.0</b>	<b>56.0</b>	<b>37.0</b>
<b>FEMALE ADULTS</b>	<b>47.1%</b>	<b>51.0%</b>	<b>48.5%</b>	<b>38.0%</b>	<b>48.5%</b>	<b>55.8%</b>	<b>43.8%</b>	<b>54.4%</b>	<b>38.8%</b>	<b>51.7%</b>	<b>24.4%</b>	<b>29.7%</b>
18-24 Years	5.6	6.1	3.5	4.1	4.8	4.7	6.9	5.4	9.7	-	0.7	2.2
25 - 34 Years	12.6	17.4	11.7	12.6	11.6	12.3	6.3	18.1	13.8	14.4	0.8	6.1
35 - 54 Years	18.4	19.6	17.2	16.4	22.1	15.4	18.8	27.3	12.0	33.4	10.6	13.8
55 + Years	10.4	8.0	16.0	4.8	9.9	23.5	11.9	3.6	3.4	3.9	12.3	7.6
<b>Average Female Age</b>	<b>41.2</b>	<b>38.9</b>	<b>45.1</b>	<b>40.5</b>	<b>41.5</b>	<b>44.4</b>	<b>44.4</b>	<b>36.7</b>	<b>34.0</b>	<b>40.1</b>	<b>51.2</b>	<b>44.7</b>
<b>Median Female Age</b>	<b>39.0</b>	<b>36.0</b>	<b>44.0</b>	<b>40.0</b>	<b>41.0</b>	<b>36.0</b>	<b>49.0</b>	<b>37.0</b>	<b>33.0</b>	<b>40.0</b>	<b>55.0</b>	<b>43.0</b>

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 31

**ANNUAL HOUSEHOLD INCOME  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Overseas leisure travelers to California had a median household income of \$67,500, compared to \$75,500 for all overseas travelers to California.
- Overseas visitors from the U.K. reported the highest median household income (\$77,000), followed by China (\$73,600) and Germany (\$70,000).

COUNTRY OF RESIDENCE OF VISITORS												
ANNUAL HOUSEHOLD INCOME*	TOTAL OVERSEAS	AUSTRALIA/ NEW ZEALAND										MEXICO (AIR)
		JAPAN	U.K.	GERMANY	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA		
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	2,441,000 (3,257)	312,000 (683)	565,000 (559)	176,000 (119)	240,000 (639)	110,000 (67)**	130,000 (76)**	88,000 (383)	106,000 (93)**	28,000 (46)**	46,000 (121)	305,000 (95)**
Under \$20,000	9.5%	5.2%	4.0%	7.6%	5.7%	33.4%	11.1%	14.0%	14.0%	14.9%	52.7%	22.3%
\$20,000 - \$59,000	34.5	36.9	28.6	36.2	43.2	22.9	39.0	46.6	47.7	31.8	23.8	34.5
\$60,000 - \$99,999	26.5	24.8	35.5	23.2	27.9	20.9	21.9	21.7	17.6	11.1	8.3	27.2
\$100,000 - \$139,999	14.7	14.8	12.9	19.2	13.1	18.1	13.1	8.6	15.9	7.3	3.1	4.7
\$140,000 - \$179,999	6.5	7.6	6.9	8.8	4.4	2.4	8.2	1.9	4.5	4.4	6.5	2.8
\$180,000 and over	8.4	10.8	11.9	5.0	5.7	2.3	6.8	7.1	0.3	30.5	5.7	8.4
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Annual Income	\$80,400	\$86,300	\$90,700	\$81,100	\$73,800	\$56,600	\$78,500	\$63,600	\$61,300	\$100,700	\$46,900	\$65,600
Median Annual Income	\$67,500	\$71,400	\$77,000	\$70,000	\$61,200	\$42,900	\$59,900	\$49,000	\$51,300	\$73,600	\$19,000	\$49,500

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 32

**NIGHTS AWAY FROM HOME  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Overseas leisure visitors to California had an average U.S. trip stay of 20 nights and an average stay in California of 10 nights. Consistent with previous years, Japanese leisure travelers reported the shortest trip stays in the U.S. (12 nights). U.K. leisure travelers reported the shortest trip stays in California (8 nights). On the other hand, leisure travelers from India reported the longest stay in the U.S. and the longest stay in California (67 nights and 32 nights, respectively).

COUNTRY OF RESIDENCE OF VISITORS												
NIGHTS IN U.S.	AUSTRALIA/ NEW SOUTH ZEALAND AMERICA											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)		
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(4,030)	(944)	(686)	(151)	(729)	(93)**	(104)	(441)	(108)	(51)**	(139)	(123)
Mean No. Nights	19.9	11.6	16.0	23.0	21.1	23.6	17.7	18.9	21.7	24.8	67.3	14.6
Median No. Nights	14.0	6.0	14.0	16.0	17.0	22.0	15.0	11.0	13.0	13.0	50.0	8.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(3,599)	(858)	(636)	(132)	(685)	(79)**	(91)**	(356)	(91)**	(44)**	(108)	(85)**
Mean Nts. in Dest.	10.4	8.6	8.0	11.1	8.8	12.7	9.8	13.1	13.5	12.0	32.2	11.6
Median Nts. in Dest.	6.0	4.0	6.0	7.0	5.0	5.0	7.0	7.0	10.0	7.0	12.0	8.0

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 33

**PORT OF ENTRY  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Once again, Los Angeles was the major port of entry for all leisure travelers to California (39%) followed by San Francisco (24%).

PORT OF ENTRY*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(4,056)	(947)	(689)	(151)	(730)	(101)	(106)	(443)	(108)	(54)**	(141)	(124)
Atlanta, GA	1.2%	-	1.2%	6.5%	-	5.6%	-	-	-	-	-	-
Boston, MA	0.5	-	0.2	-	0.1%	-	-	-	-	-	-	-
Chicago, IL	4.7	1.1%	7.5	7.8	0.9	2.5	3.1%	0.8%	-	1.0%	1.8%	-
Cincinnati, OH	0.3	-	0.1	3.0	-	-	1.8	-	-	-	-	-
Dallas/Ft. Worth, TX	0.7	0.4	0.3	1.0	-	7.7	1.0	-	-	-	-	1.4%
Detroit, MI	0.6	2.3	-	-	-	-	-	3.8	-	-	1.2	-
Honolulu, HI	1.8	3.3	0.3	-	8.5	-	-	1.4	5.9	3.4	-	-
Houston, TX	0.6	0.4	0.3	0.2	-	5.7	2.4	-	-	-	-	3.5
Los Angeles, CA	39.0	50.1	35.7	29.2	67.5	10.9	21.5	58.3	41.9	35.3	23.6	69.7
Miami, FL	2.7	-	2.1	-	1.2	45.1	0.7	-	-	0.1	0.5	-
Minn./St. Paul, MN	0.2	0.5	-	-	-	-	1.3	-	-	-	0.7	-
New York, NY	4.7	1.3	4.1	3.3	3.7	8.4	5.1	0.7	-	4.3	7.1	-
Newark, NJ	1.8	-	2.0	2.1	0.4	-	8.8	0.1	-	-	5.7	-
Orlando, FL	0.1	-	0.5	-	0.1	-	-	-	-	-	-	-
Philadelphia, PA	0.3	-	-	-	0.1	-	2.9	-	-	-	0.2	-
Portland, OR	0.1	0.1	-	0.9	-	-	-	-	-	-	0.1	-
San Francisco, CA	23.7	35.2	26.8	28.5	10.7	0.4	33.3	23.3	31.1	30.3	26.8	13.1
Seattle, WA	0.6	0.9	0.6	-	-	-	-	0.6	2.6	-	0.4	-
Washington, DC	2.7	-	3.5	5.5	0.7	2.2	2.3	-	-	-	5.2	-
Other Port	13.5	4.4	14.7	12.1	6.2	11.4	15.9	10.9	18.4	25.5	27.0	12.4
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.

Table 34

**ACCOMMODATIONS  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Three-quarters (74%) of overseas leisure travelers to California reported staying in hotels or motels at some time during their trip. Hotel usage was highest among visitors from the U.K. (84%) followed by visitors from Australia/New Zealand (83%) and Germany (78%). Hotel usage was lowest among visitors from India (34%). A high proportion of Indian (79%), Taiwanese (70%), and Mexican (66%) leisure travelers stayed in private homes.

TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS (Number of Respondents)	2,441,000 (3,420)	312,000 (805)	565,000 (621)	176,000 (124)	240,000 (667)	110,000 (73)**	130,000 (86)**	88,000 (328)	106,000 (85)**	28,000 (38)**	46,000 (102)	305,000 (82)**
<b>Hotel / Motel</b>	<b>74.2%</b>	<b>76.0%</b>	<b>83.6%</b>	<b>77.7%</b>	<b>82.9%</b>	<b>57.5%</b>	<b>74.8%</b>	<b>38.6%</b>	<b>70.1%</b>	<b>63.9%</b>	<b>33.3%</b>	<b>49.9%</b>
Mean Nights in Dest.	5.5	4.1	6.1	5.6	5.8	5.6	5.2	5.9	4.6	7.0	4.9	3.7
Median Nights in Dest.	4.0	3.0	5.0	5.0	5.0	4.0	5.0	4.0	3.0	7.0	3.0	3.0
<b>Private Home</b>	<b>35.9%</b>	<b>31.7%</b>	<b>23.5%</b>	<b>42.5%</b>	<b>23.8%</b>	<b>43.8%</b>	<b>33.9%</b>	<b>70.0%</b>	<b>56.9%</b>	<b>44.6%</b>	<b>79.1%</b>	<b>66.1%</b>
Mean Nights in Dest.	15.6	14.1	11.2	14.8	13.9	23.6	14.1	15.1	14.7	16.7	38.0	15.6
Median Nights in Dest.	9.0	7.0	10.0	7.0	8.0	11.0	11.0	9.0	11.0	6.0	18.0	11.0
<b>Other</b>	<b>3.5%</b>	<b>1.0%</b>	<b>2.2%</b>	<b>5.6%</b>	<b>3.9%</b>	<b>1.0%</b>	<b>4.6%</b>	<b>3.7%</b>	<b>5.9%</b>	<b>5.2%</b>	<b>0.6%</b>	<b>0.9%</b>

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 35

**TRANSPORTATION IN THE U.S.  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Leisure travelers relied upon a variety of transportation within the U.S. including domestic flights (40%), rental cars (38%), taxis/limousines (34%), and private or company autos (33%). Rental car use was highest among French (66%), German (53%), and South Korean (41%) leisure visitors. The lowest use of rental cars was reported by leisure visitors from Mexico (18%). Leisure visitors from Australia/New Zealand and China relied heavily on domestic airline travel (54% and 45%, respectively), whereas leisure visitors from Taiwan relied heavily on a company or private auto (58%).

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
(Number of Respondents)	(3,661)	(867)	(627)	(139)	(666)	(76)**	(95)**	(402)	(98)**	(48)**	(116)	(105)
Airlines in U.S.	39.6%	30.9%	35.1%	32.4%	54.2%	41.2%	31.1%	34.6%	38.7%	45.4%	37.3%	22.5%
Rented Auto	38.0	26.8	34.6	53.4	37.0	32.3	66.3	28.6	40.5	28.9	29.5	18.2
Taxi/Cab/Limousine	33.8	33.0	43.9	13.6	44.1	23.0	30.1	24.5	19.7	23.1	40.1	25.6
Company or Private Auto	33.0	39.1	23.7	25.5	29.8	42.6	24.5	58.0	52.5	40.4	20.1	51.2
City Subway/Tram/Bus	26.8	27.2	29.0	27.3	37.1	15.1	30.6	25.7	19.7	14.6	19.7	15.7
Bus between Cities	11.4	9.1	15.5	2.1	15.9	19.9	3.4	11.7	11.1	10.0	13.6	16.1
Railroad between Cities	8.7	8.6	7.0	14.0	12.3	2.3	6.1	5.9	8.2	13.4	18.6	17.1
Motor Home/Camper	2.7	1.5	1.6	3.7	1.8	0.7	-	1.0	4.3	12.1	8.6	-

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.  
CIC Research, Inc.

Table 36

**TRIP EXPENDITURES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2004)**

- Overseas leisure travelers in 2004 reported total expenditures in the U.S. of \$1,677, 17 percent higher than that reported in 2003 (\$1,428). The 2004 mean daily expenditure was \$84 per visitor, up 8% from \$78 per day in 2003. As a comparison, all overseas travelers to California reported U.S. expenditures of \$1,932 or \$95 per day.
- Leisure visitors from Australia/New Zealand reported the highest international airfare per visitor per trip (\$1,995), while Mexican air travelers reported the least expensive airfare (\$876).

COUNTRY OF RESIDENCE OF VISITORS												
AVERAGE PER VISITOR TRIP EXPENDITURES	AUSTRALIA/ NEW ZEALAND											
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	CHINA w/o HK	INDIA	MEXICO (AIR)
ESTIMATED TRAVELERS	2,441,000	312,000	565,000	176,000	240,000	110,000	130,000	88,000	106,000	28,000	46,000	305,000
TOTAL TRIP	\$3,149	\$2,718	\$3,093	\$3,051	\$3,905	\$2,794	\$2,439	\$2,557	\$2,205	\$2,664	\$3,811	\$2,156
(Number of Respondents)	(2,193)	(485)	(380)	(91)**	(455)	(37)**	(47)**	(218)	(49)**	(25)**	(74)**	(66)**
INCLUSIVE TOUR PRICE	\$1,981	\$1,471	\$2,040	\$2,363	\$2,934	\$3,735	\$1,699	\$1,081	\$878	\$1,045	\$557	\$1,660
(Number of Respondents)	(722)	(192)	(197)	(17)**	(127)	(7)**	(16)**	(54)**	(25)**	(3)**	(4)**	(7)**
INTERNATIONAL AIRFARE	\$1,312	\$1,265	\$1,315	\$986	\$1,995	\$991	\$1,114	\$1,080	\$1,115	\$904	\$1,497	\$876
(Number of Respondents)	(2,506)	(466)	(365)	(105)	(568)	(49)**	(60)**	(297)	(62)**	(40)**	(102)	(81)**
EXPENDITURE IN U.S.*	\$1,677	\$1,335	\$1,549	\$1,874	\$1,912	\$1,561	\$1,098	\$1,615	\$1,209	\$1,667	\$2,455	\$1,137
(Per Day)	\$84	\$116	\$97	\$81	\$91	\$66	\$62	\$85	\$56	\$67	\$36	\$78
(Number of Respondents)	(2,599)	(582)	(467)	(106)	(510)	(50)**	(58)**	(258)	(59)**	(32)**	(85)**	(76)**
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(NUMBER OF RESPONDENTS)	(2,599)	(582)	(467)	(106)	(510)	(50)**	(58)**	(258)	(59)**	(32)**	(85)**	(76)**
TRANSPORT IN U.S.	\$275	\$164	\$207	\$321	\$271	\$248	\$150	\$269	\$182	\$246	\$713	\$214
LODGING IN U.S.	\$368	\$290	\$398	\$578	\$407	\$344	\$253	\$186	\$285	\$262	\$296	\$115
FOOD, BEVERAGES	\$364	\$243	\$373	\$449	\$407	\$290	\$310	\$331	\$236	\$302	\$423	\$180
GIFTS, SOUVENIRS	\$365	\$380	\$266	\$262	\$403	\$380	\$248	\$508	\$331	\$500	\$557	\$344
ENTERTAINMENT	\$203	\$154	\$230	\$186	\$280	\$206	\$95	\$231	\$37	\$183	\$244	\$134
OTHER	\$76	\$59	\$52	\$60	\$125	\$60	\$28	\$62	\$90	\$146	\$212	\$90
AVERAGE NIGHTS IN U.S.	19.9	11.6	16.0	23.0	21.1	23.6	17.7	18.9	21.7	24.8	67.3	14.6
AVERAGE NIGHTS IN CALIF.	10.4	8.6	8.0	11.1	8.8	12.7	9.8	13.1	13.5	12.0	32.2	11.6
MEDIAN NIGHTS IN CALIFORNIA	6.0	4.0	6.0	7.0	5.0	5.0	7.0	7.0	10.0	7.0	12.0	8.0

\*Overseas visitors on exclusive tour packages were excluded.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.



Table 37

**EXPENDITURES**  
**OVERSEAS AND MEXICAN LEISURE VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS\***  
**(2004)**

- Nearly thirty-eight percent of overseas leisure visitors to California did not visit any other state in the U.S. These California-only leisure visitors reported spending \$2,628 per capita on their entire trip, 16% more than the \$2,257 spent in 2003. Approximately half of their total trip expenditures were in California (\$1,358).
- Average daily California expenses for California-only leisure visitors was \$78, up 10% from the \$71 per day reported in 2003.

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$2,628
(NUMBER OF RESPONDENTS)	(900)
INCLUSIVE TOUR PRICE	\$1,926
(NUMBER OF RESPONDENTS)	(166)
INTERNATIONAL AIRFARE	\$1,201
(NUMBER OF RESPONDENTS)	(1,075)
EXPENDITURE IN CALIFORNIA	\$1,358
PER DAY	\$78
(NUMBER OF RESPONDENTS)	(1,094)
<u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(1,094)
TRANSPORT IN U.S.	\$187
LODGING	\$288
FOOD, BEVERAGES	\$281
GIFTS, SOUVENIRS	\$338
ENTERTAINMENT	\$161
OTHER	\$74
<u>AVERAGE NIGHTS IN CALIFORNIA</u>	14.1

\*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2004.

CIC Research, Inc.

## **APPENDIX A**

### **SURVEY BACKGROUND**

#### **Introduction**

This report on overseas visitors to California is based on data compiled from the Office of Travel & Tourism Industries (ITA – OTTI), Survey of International Air Travelers. The survey information is collected from passengers through questionnaires covering the traveler, the air trip, activities and places visited, and air travel expenditures.

The survey is conducted voluntarily by selected major airlines on a sample of their international flights departing from U.S. airports. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used to guide planning oriented toward the activities of international air travelers for both the public and private sectors.

#### **Questionnaire Content**

The survey questionnaire is designed to obtain responses from U.S. as well as non-U.S. residents. The questionnaire contains questions about the travelers (e.g., age, sex, family income, country and city of residence, previous travel experience, etc.). It also contains many basic questions about the current trip (e.g., type of air ticket, travel party composition, nights away from home, trip purpose, etc.).

The distinguishing features of this questionnaire are the complete trip itinerary and the trip expenditure data items. These items collect more complete data on these areas than are available elsewhere. Every major destination visited is covered, as is the length of stay and the type of accommodations utilized. Travel expenditures are also covered by type of expenditure. The entire questionnaire is reproduced in Appendix B.

#### **Survey Operations**

Data are collected monthly through in-flight passenger surveys conducted on a sample of the participating airlines' scheduled international flights that depart from United States airports during the seven days beginning with the third Monday of the month. Participating airlines receive advance listings of the flights to be surveyed, followed by a survey kit for each sample flight. The kits each contain instructions and questionnaires in the appropriate language. (The questionnaire is available in English, French, German, Italian, Japanese, Spanish, Korean and Chinese).

Airline cabin personnel distribute the self-administered questionnaires to all adult passengers and collect the completed forms prior to debarkation.

#### **Sample Design**

The sample is designed around the geographic detail desired for the resulting estimates and the specific airlines willing to participate in the survey. The design is a stratified, two-stage cluster sample, where scheduled flights are randomly selected from strata defined by airline and foreign destination in the first stage of the sample. When the survey is conducted on a selected flight, those passengers who respond are considered to represent all passengers on that flight.

#### **Understanding the Estimates**

Since airline participation is voluntary and changes from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travel.

With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service. Passengers on charter flights and persons traveling by air between the U.S. and Canada are excluded.

The estimates are subject to a certain amount of error resulting from the sampling, data collection, and estimation processes. Because of the complicated nature of the sample design and the resulting computational burden, sampling variability has not been calculated for the estimates. Instead, an indication of the reliability of a set of related estimates is given by the number of respondents to the relevant questionnaire items. The reader must exercise judgment in determining the amount of confidence to place in an estimate and in its proper use. For example, an estimate based on 500 respondents is more reliable than one based on 200 respondents. Several kinds of estimates appear in the tables. The majority are in the form of percent distributions of the responses to questionnaire items. Distributions for items allowing only one choice of response will total to 100 percent. Those allowing more than one choice may total to more than 100 percent. Where the symbol “--” appears, this means that no or limited data is available for that response.

In addition to estimates of percents, estimates of means and medians are shown for travel party size, age, annual family income, number of nights stayed and by type of accommodations.

## Definitions

Notes of explanation for selected variables appearing in the row headings of the tables are given below.

Residence of Visitors: In the overseas tables the major traffic-generating countries are listed by world regions, as described in Appendix C. Countries not listed are combined by region into the "Other Region X" categories.

Type and Size of Travel Party: A travel party can fall into only one of these categories: traveling alone; family group; business group; and mixed business, family, and other. These four categories total 100

percent. A party is classified as mixed if the party is a combination of two or more of the other categories. Mean and median party size are computed from the distribution of frequencies of parties of different sizes (for example, three passengers traveling together are counted as a single party in the frequency distribution from which mean and median party size are computed).

Air Expenditures: The amounts shown for mean international airfare and mean expenditures while in the United States on this trip are those amounts spent over and above any inclusive tour expenditures paid prior to beginning the trip. The categories are mutually exclusive.

Mean: The mean is the sum of all responses divided by the number of responses.

Median: The median is that value for which 50 percent of the values lie below it and 50 percent are above it.

Leisure Visitors: Are defined as those visitors whose main purpose of trip is vacation/holidays or visiting friends/relatives.

## **APPENDIX B QUESTIONNAIRE**

**UNITED STATES DEPARTMENT OF COMMERCE  
United States International Trade Administration**

**SURVEY OF  
INTERNATIONAL  
AIR TRAVELERS**

**DEPARTING THE UNITED STATES**

Dear International Traveler:

Please help the travel industry improve the services they offer you. The information collected in this survey is used by airlines, travel agents, hotels, government travel offices, and other travel planners and providers to understand you, the international traveler, and thereby take steps to improve your next international trip.

This questionnaire is designed to be completed by both non-U.S. residents who have visited the country and U.S. residents traveling abroad. If you are 18 years of age or older, please complete this voluntary survey. **ONLY ONE RESPONSE PER FAMILY GROUP, PLEASE.**

Upon completing this survey, please return it to the person who provided it to you. The estimated average time to complete this questionnaire is 15 minutes. Should you have any comments regarding this survey, please send them to Tourism Industries, ITA, Washington DC 20230, or Office of Information and Regulatory Affairs, OMB, Project 0605-0007, Washington, DC 20503.

Thank you for your cooperation on this important survey.

This survey also available in Japanese, French, German, Spanish, Chinese, Korean, Polish, Portuguese, Russian, Italian.

OMB CLEARANCE NO. 0605-0007

ONLY ONE RESPONSE PER FAMILY, PLEASE

1a. Date

b. Name of Airline

c. Flight Number

d. Please rate your general impression of this airline.

Mark (X) ONE

☐ Excellent

☐ Good

☐ Average

☐ Fair

☐ Poor

2a. What are your City, State, ZIP (postal) Code, and Country of Residence? - Specify

b. If this flight is part of an outbound journey from your home, what will be the main destination on your trip? - Specify

c. For NON-US Residents ONLY  
If this flight is part of the return journey to your home, what was the main destination that you visited since you left home? - Specify

3a. What is your country of CITIZENSHIP? - Specify

b. What is your country of BIRTH?

US Residents - SKIP to question 4b

4a. For Non-US Residents ONLY  
At what city or airport did you pass through U.S. Customs/Immigration? - Specify

4b. If you are a US resident, at what city or airport will you pass through U.S. Customs/immigration when

you return?

--- Specify

5a. At what airport did or will you board this aircraft today?

--- Specify

b. Did you make a connecting flight?

☐ No

☐ Yes - From which airport? - Specify

c. At which airport will you leave this aircraft? - Specify

d. Once there, are you making a connecting flight?

☐ No

☐ Yes - To which City? --Specify

6. How did you obtain information used to plan your trip?

Mark (X) ALL that apply

☐ Airlines directly

☐ In-flight information systems

☐ National government tourist office

☐ State/City travel office

☐ Friends or relatives

☐ Travel agency

☐ Travel guides

☐ Tour company

☐ Corporate travel department

☐ Newspaper/Magazine

☐ TV/Radio

☐ Personal computer

7. How long before you departed on this trip did you -

Decide to travel?

Make airline reservation?

8. How were your AIRLINE reservations for this trip made?

Mark (X) ONE

☐ A travel agent

☐ Travel club

☐ The Airline directly

☐ The company's travel department

☐ Tour operator

☐ Personal computer

☐ Don't know

☐ Other

9a. **Were commercial LODGING reservations made for this trip before you left home?**

**Mark (X) ONE**

- ☐ Yes – Go to question 9b  
☐ No – SKIP to question 10a

b. **These reservations were made through.....**

**Mark (X) ALL that apply**

- ☐ A travel agent  
☐ The hotel/motel staff directly  
☐ The company's travel department  
☐ A tour operator  
☐ Airline staff  
☐ A friend or relative  
☐ Business associate  
☐ Other

10a. **What is/was the MAIN purpose of your trip?**

**Mark (X) ONE**

- ☐ Business/Professional  
☐ Convention/Conference/Trade show  
☐ Leisure/Recreation/Holidays/Sightseeing  
☐ Visit friends/Relatives  
☐ Government affairs/Military  
☐ Study/Teaching  
☐ Religion/Pilgrimages  
☐ Health treatment  
☐ Other – Specify --

CONTINUE WITH QUESTION 10B

10b. **Does this trip have any other purposes?**

**Mark (X) ALL that apply**

- ☐ Business/Professional  
☐ Convention/Conference/Trade show  
☐ Leisure/Recreation/Holidays/Sightseeing  
☐ Visit friends/Relatives  
☐ Government affairs/Military  
☐ Study/Teaching  
☐ Religion/Pilgrimages  
☐ Health treatment  
☐ Other – Specify --

11. **With whom are you traveling now?**

**Mark (X) ALL that apply**

- ☐ Spouse  
☐ Family/Relatives  
☐ Business associate(s)  
☐ Friend(s)  
☐ Tour group  
☐ Traveling alone

12. **Altogether, how many adults and/or children are in your travel party?** Exclude your tour group members unless you knew them and planned to travel with them prior to booking the tour.

**Number of adults**

**Number of children**

**Under 18 years old**

13. **How many nights away from home will you spend or have you spent on this trip?**

**Number of nights in the USA**

(including U.S. territories)

**Number of nights outside**

**the USA**

14. **IN ORDER OF VISIT, list the principal places visited or to be visited on this trip. and indicate the number of nights at each place.** Under number nights, if you did not or will not stay overnight at a place visited, enter "0". Under the section for type of lodging, indicate the lodging company name, or check the appropriate space

Destinations (Cities/Attractions) Enter ONLY ONE destination per line	State or Country	Number of Nights	Type of Lodging Select ONE per line		
			Hotel/Motel Specify name of company	Mark (X)	
				Private Home	Other
1.					
2.					
3.					
4.					
5.					
6.					
7.					

15a. **Is this trip part of a package?** Mark (X) ONE

☐ No --- SKIP to question 16

☐ Yes --- **Which of the following does your package include?**

Mark (X) ALL that apply

- ☐ Airfare  
☐ Rental car  
☐ Tour escort for entire trip  
☐ Cruise  
☐ Intercity bus/Coach transportation  
☐ Commercial guided tours  
☐ Commercial lodging – **How many nights lodging are included?**

b. **How many days prior to departure was this package booked?**

---Specify

c. **What is the approximate cost of your prepaid package?**

Please give your answer in U.S. dollars or your own country's currency.

**IF OTHER THAN U.S. CURRENCY**

Specify country of currency used.

16. **About your trip expenditures... please estimate the amount of money spent, or expected to be spent for the following items.** Please remember your name is not on this form. Your cooperation in completing this important question is appreciated.

a. **Please estimate how much money you spent, or will spend, outside your own country.** Do not include those items which were covered in the package mentioned in 15c above. --- Specify

b. **Country of currency used for estimate** ---Specify

c. **How many people are covered by this expenditure estimate?**

Specify total number of people.

d. **What was the total cost of your international air travel tickets? –**

Specify

☐ Mark (X) here if you do NOT know cost of tickets.

e. **Are these ONE WAY tickets?**

Mark (X) ONE

☐ Yes

☐ No

f. **How much did you spend at the airport of your USA departure? –**

Specify

**U.S. Residents – SKIP to question 17.**

**For Non-U.S. Residents ONLY**

g. Of the total expenditure given in 16a,

**Please estimate how much was spent in the USA.** --- Specify

h. Of the total expenditure given in 16g above, **please estimate how much was for---**

1. **Transportation**

2. **Lodging**

3. **Foods and beverages**

4. **Gifts, souvenirs and other purchases**

5. **Entertainment and recreation**

6. **Other spending (if any)**



**17. Please tell us about how you did, or will, pay for your expenses on this trip--**

Type of payment	Percentage paid For expenses	Company(ies) of issue
<b>Credit card(s)</b>	%	
<b>Travelers check(s)</b>	%	
<b>Debit card(s)</b>	%	
<b>Cash</b>	%	
<b>TOTAL</b>	<b>100%</b>	

**18. What types of transportation did you, or will you, use when reaching your destination on this trip?**

*Mark (X) ALL that apply*

- ☐ Airlines within the USA
- ☐ Airlines outside the USA
- ☐ Railroad between cities
- ☐ Rented auto --- *Specify company name*

- ☐ Taxi/Cab/Limousine
- ☐ City subway/Tram/Bus
- ☐ Bus between cities
- ☐ Company or private auto
- ☐ Motor home/Camper

**19. Which of the following leisure activities did you, or will you, spend time on during this trip?**

*Mark (X) ALL that apply*

- ☐ Shopping
- ☐ Dining in restaurants
- ☐ Amusement/Theme parks
- ☐ Visiting historical places
- ☐ Visiting casinos/Gambling
- ☐ Commercial guided tours
- ☐ Visiting small towns and villages
- ☐ Cultural heritage sights/Activities
- ☐ Touring the countryside
- ☐ Water sports/Sunbathing
- ☐ Ranch vacations
- ☐ Cruises
- ☐ Hunting/Fishing
- ☐ Snow skiing
- ☐ Golfing/Tennis
- ☐ Environmental/Ecological excursions
- ☐ Visiting national parks
- ☐ Visiting American Indian communities
- ☐ Attending sports event
- ☐ Concert/Play/Musical
- ☐ Art gallery/Museum
- ☐ Sightseeing in cities
- ☐ Nightclubs/Dancing
- ☐ Ethnic heritage sights/Activities

**20. Please rate this airline for this trip on each of the following attributes.**

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Convenient schedule 0 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	
b. Ticket price	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Reservation service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Check-in waiting time	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Check-in personnel	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Airline club/lounge	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. On-time departure	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. Food/Beverage quality	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Flight attendant service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Audio/Video	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
k. Cabin cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
l. Cabin noise level	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
m. Seat comfort	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
n. Cabin layout	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
o. Carry-on storage space	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
p. Overall evaluation of aircraft	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
q. Overall evaluation of flight	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

**21. Would you choose or recommend this airline for your next trip on this route?**

Mark (X) ONE

- ☐ Definitely would  
☐ Probably would  
☐ Probably would not  
☐ Definitely would not  
☐ Not sure

**22. What were your three main reasons for flying on THIS AIRLINE?** Indicate by marking "1" for the most important reasons, "2" for the next most important reason, and "3" for the third most important reason. DO NOT indicate more than three reasons.

<input type="checkbox"/> Airfare	<input type="checkbox"/> On-time reputation
<input type="checkbox"/> Convenient schedule	<input type="checkbox"/> Previous good experience
<input type="checkbox"/> Non-stop flights	<input type="checkbox"/> Mileage bonus/Frequent flyer program
<input type="checkbox"/> Employer policy	<input type="checkbox"/> In-flight service reputation
<input type="checkbox"/> Safety reputation	<input type="checkbox"/> Not involved in choice of carrier
<input type="checkbox"/> Loyalty to carrier	<input type="checkbox"/> Other ----- Specify

**23a. Where are you sitting today?**

Mark (X) ONE

- ☐ First class  
☐ Executive/Business class  
☐ Economy/Tourist/Coach

**b. What type of airline ticket do you have?**

Mark (X) ALL that apply

- ☐ First class  
☐ Executive/Business class  
☐ Economy/Tourist/Coach  
☐ Frequent flyer free ticket  
☐ Frequent flyer upgrade  
☐ Discount/Group fare  
☐ Non-revenue  
☐ Don't know

**24. Please rate the following attributes of the AIRPORT from which you have just departed (or are currently waiting to depart) the United States.**

Mark (X) ONE rating for each

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Airport access	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
b. Ground transportation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Airport terminal convenience	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Airport terminal cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Concession goods/Services	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Concession prices	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. Terminal seating availability	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. International Traveler facilities	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Security measures	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Overall airport evaluation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

**U.S. residents --- SKIP to question 26a**

**25 a. For Non-U.S. Residents Only:**

**When entering the USA, please rate your Immigration and Naturalization Service/Passport Control and U.S. Customs experience at the airport where you entered the USA.**

Mark (X) ONE rating for each

	Excellent	Good	Average	Fair	Poor	
	Don't Know					
<b>a. Passport Control</b>						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0
<b>b. Customs baggage clearance</b>						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0

**b. About how long did it take you to clear Passport Control and Customs when entering the United States?**

Specify in minutes

**Baggage delivery waiting time**

Mark (X) ONE rating

- ☐ Excellent  
☐ Good  
☐ Average  
☐ Fair  
☐ Poor  
☐ Don't know

**26a. Did you have personal safety concerns before you started your international trip?**

Mark (X) ONE

- ☐ Yes  
☐ No

**b. Did your concerns cause you to change your travel plans?**

Mark (X) ONE

- ☐ Yes  
☐ No

**26c. For Non-U.S. Residents ONLY****Was your personal safety actually endangered while in the USA?**

Mark (X) ONE

Ⓐ No – Go to question 27

Ⓑ Yes – Indicate the city(ies) where incidents(s) took place and mark (X) the appropriate category(ies) below.

City	Incidents – Mark (X)					
	Harassment/ Arguments	Assault/ Physical Harm	Burglary/ Theft	Transportation accident	Health Problem	Other -- Specify

**27a. Is this your first trip by air to/from the United States?**

Mark (X) ONE

Ⓐ Yes – SKIP to question 28

Ⓑ No – Go to question 27b

**b. Altogether, how many round trips by air have you made to/from the United States ---**

In the past 12 months?

In the past 5 years?

**28. Please give us some information about yourself.****a. What is your occupation?**

Mark (X) ONE

Ⓐ Manager/Executive

Ⓑ Professional/Technical

Ⓒ Clerical/Sales

Ⓓ Craftsman/Mechanic/Factory worker

Ⓔ Government/Military

Ⓕ Homemaker/

☐ Retired☐ Student☐ Other -- Specify
**b. Age**

**c. Gender ---Mark (X) ONE**☐ Female☐ Male**29. What is the total combined yearly income of all members of your household? Give your answer either in USA dollars or in your own country's currency. Please specify the country of currency if NOT USA dollars.**

In USA dollars ---

OR

In currency other than USA dollars –

Specify

Mark (X) ONE

☐ Under \$20,000☐ \$20,000 - \$39,999☐ \$40,000 - \$59,999☐ \$60,000 - \$79,999☐ \$80,000 - \$99,999☐ \$100,000 – \$119,999☐ \$120,000 – \$139,999☐ \$140,000 -- \$159,999☐ \$160,000 -- \$179,999☐ \$180,000 -- \$199,999☐ \$200,000 and aboveTotal annual  
household income

Country of currency

**THANK YOU FOR COMPLETING THIS QUESTIONNAIRE.  
WE HOPE YOUR TRIP WAS OR WILL BE AN ENJOYABLE ONE.**

## APPENDIX C

### WORLD BY REGION AND COUNTRY OR TERRITORY

#### Mexico

Mexico City  
Guadalajara  
Monterey  
Acapulco  
Other Mexico

#### Central America

Belize  
Costa Rica  
El Salvador  
Guatemala  
Honduras  
Nicaragua  
Panama Republic  
San Andres Island

#### South America

Argentina  
Bolivia  
Brazil  
Chile  
Colombia  
Ecuador  
French Guiana  
Guyana  
Paraguay  
Peru  
Surinam  
Uruguay  
Venezuela

#### Caribbean

Anguilla Island  
Antigua  
Bahama Island  
Barbados  
Bermuda  
Cuba  
Dominica  
Dominican Republic  
Grand Cayman  
Grenada  
Guadeloupe  
Haiti  
Jamaica  
Martinique  
Montserrat Island  
Neth. Antilles  
Nevis  
Providential Islands  
St. Barthelemy  
St. Kitts  
St. Lucia  
St. Vincent  
Trinidad/Tobago  
Turks/Calcos  
Virgin Islands/UK

#### Europe

Austria  
Belgium  
Bosnia-Herzegovina  
Bulgaria  
Byelarus (Belarus)  
Croatia  
Czech Republic  
Denmark  
Finland  
France  
Georgia  
Germany  
Greece  
Holy See  
Hungary  
Iceland  
Ireland  
Italy  
Kazakhstan  
Kyrgyzstan  
Lithuania  
Luxembourg  
Malta  
Netherlands  
Norway  
Poland  
Portugal  
Romania  
Russia  
Slovakia  
Slovenia  
Spain  
Sweden  
Switzerland  
Tajikistan  
Turkmenistan  
Ukraine  
United Kingdom  
Uzbekistan  
Yugoslavia

#### Africa

Algeria  
Cameroon  
Canary Islands  
Cape Verde Island  
Ethiopia  
Gabon  
Ghana  
Guinea  
Ivory Coast  
Kenya  
Liberia  
Morocco  
Nigeria  
SW Africa/S. Africa  
Senegal  
Tanzania  
Togo  
Tunisia  
Zambia  
Zimbabwe

#### Middle East

Egypt  
Bahrain  
Cyprus  
Iran  
Iraq  
Israel  
Jordan  
Kuwait  
Lebanon  
Qatar  
Saudi Arabia  
Syria  
Turkey  
United Arab Emirates

#### Far East

Bangladesh  
Brunei  
China/Mainland  
China/Taiwan  
Hong Kong  
India  
Indonesia  
Japan  
Korea-South  
Malaysia  
Okinawa/Ry Island  
Pakistan  
Philippines  
Singapore  
Thailand

#### Oceania

Australia  
Cook Islands  
Fiji Islands  
French Polynesia  
Kiribati  
Micronesia  
Nauru Republic  
New Zealand  
Papua/New Guinea  
Tonga

